



All About ASAPs (Automated Schedule Adjustment Plans)

Webinar handout

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ASAP (Automated Schedule Adjustment Plan)

The ASAP feature automates a range of common schedule and intraday management administrative tasks using a variety of plan types. It is designed to work with notification channels, which for some plans allows agents to accept or decline offers for work adjustments such as overtime or voluntary time off (VTO). Agents are notified via selected channels including email, SMS, pop-up desktop notifications, and the Community Everywhere mobile application.

Using an ASAP allows you to make hundreds of schedule changes and notify agents in just a few clicks. Once you master a single plan type, you will find it very easy to use the others.

ASAP Types

There are eight primary ASAPs that fall into three categories (modify schedule, increase staff, decrease staff). Each plan executes a specific schedule modification and supports a variety of options.

Modify Current Schedules

Modify current schedule plans allow you to automate routine bulk scheduling tasks such as deleting events, or changing the event type or day, with a goal of reducing manual effort by schedulers, supervisors, and administrators. Once executed, affected agents are notified of the changes via the selected notification channel(s).

Optimize Off-phone Events – optimize breaks and lunches, meetings and/or trainings, intraday. For example: If several people call out sick, or you are seeing an increase in call volume, you can re-optimize breaks and lunches for some or all agents (or just the breaks **or** the lunches).

Delete Scheduled Events – This plan allows you to select one or more events and a time range, and it will mass delete qualifying events from the schedules of agents who you select. It will not ask permission from the agent first, though the agent will get a notification that there is a change to their schedule.



Edit Scheduled Events – This plan allows you to edit the date, time, and event codes or any combination of the three. Need to move coaching to tomorrow at the same time? Just coded 50 trainings with coaching instead of supervisor review and need to change them? Edit Scheduled Events makes it easy.

Increase Available Staff

Increase available staff plans allow you to offer extra hours to agents and allows them to respond rapidly, quickly increasing agent contact work time. These plans provide the option for “agent acceptance,” allowing you to enable participant counts – strategies that limit the number of respondents (e.g., only 5 people can accept the offer of overtime).

Recover Off-Phone Events – Replace (or modify) events with contact work.

Extend Scheduled Shifts – Use to add time to the start or end of an existing shift. Not an event, but a schedule extension. Consider adding an overtime event instead if you need to track overtime for reporting. An agent must have a schedule in place on the selected day for this plan.

Create Overtime Shifts – Use to offer overtime to agents (mandatory or optional). This plan type can be offered to agents without a current schedule in place.

Decrease Available Staff

These plans will reduce contact work time by redirecting agents to other activities (such as meetings or coaching) or reducing shift duration (with voluntary time off). These plans provide an option for “agent acceptance,” allowing you to enable participant counts – strategies that limit the number of respondents (e.g., only 5 people can accept the offer to leave early).

Plan a Meeting – Use this plan to let the system find the most appropriate time to schedule a meeting, or to tell you which agents can attend a meeting at a specified time.

Note: If the meeting is mandatory (it must happen on a given day) there may be no perfect time in the schedule, but CommunityWFM will present you with the best options.

Create VTO Events – Use to offer voluntary time off when call volume is low.



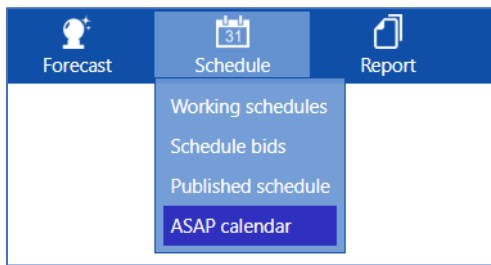
Navigating to the ASAP Interface

Only roles with permission (e.g., schedulers, administrators) have access to create ASAPs. Restricted users will not see the module.

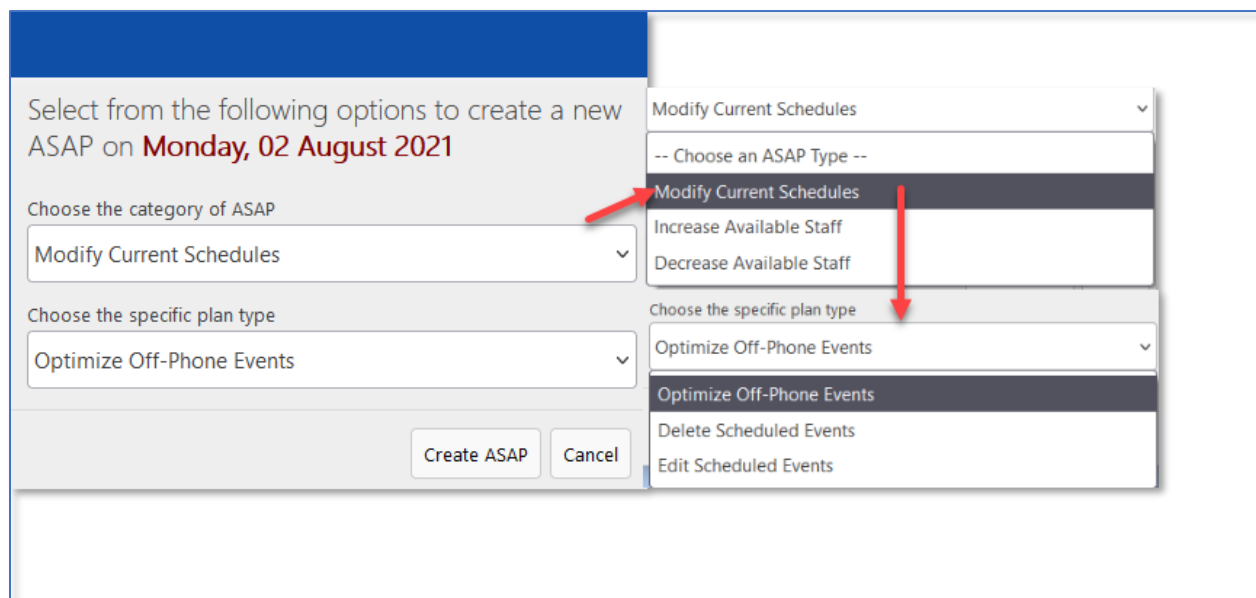
Access the ASAP module from three places.

1. Schedule menu > ASAP calendar
2. Published Schedule Report (at the top of the page)
3. Daily Adherence Report (at the top of the page)

1. From the **ASAP calendar** (Schedule > ASAP calendar)

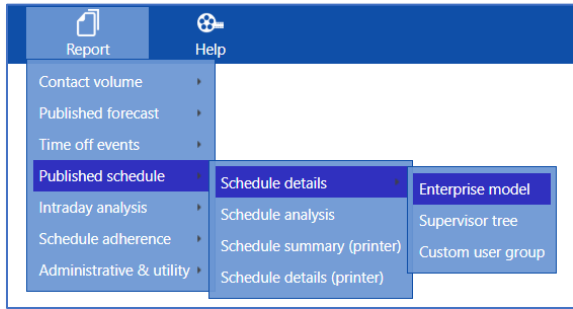


Click on any day in the calendar to start an ASAP, then select from the drop-down menus to choose the category (modify current schedule, increase staff, decrease staff) and the specific ASAP plans will be available from the plan type drop-down.

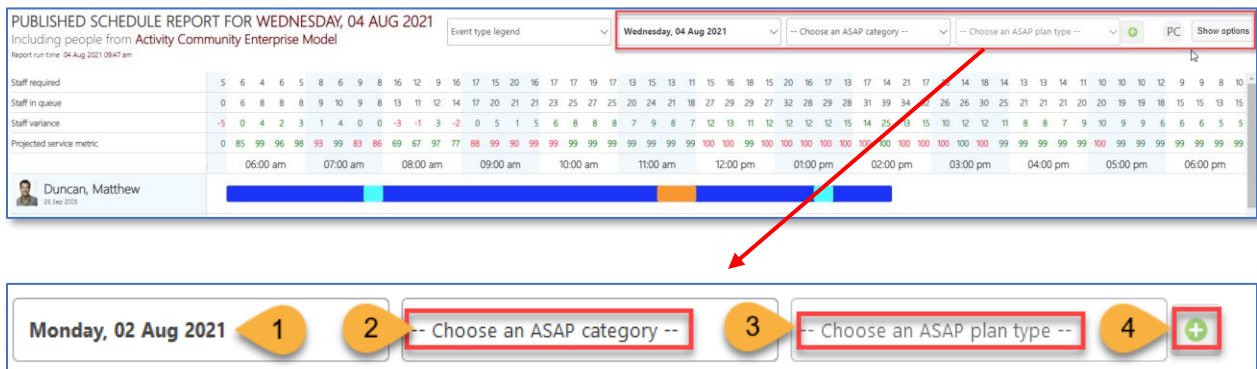




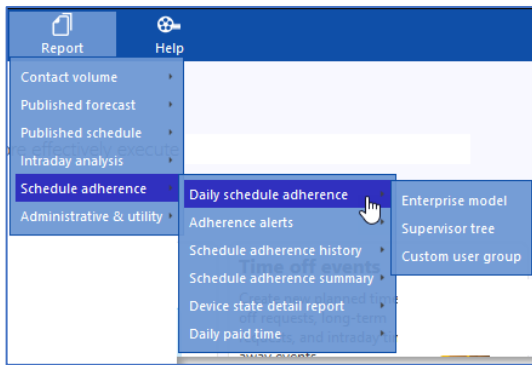
- From a **Published Schedule Report** (Report > Published schedule > Schedule details > Enterprise model/Supervisor tree/Custom user group).



At the top of the page: select a date, then from the drop-down menu select the ASAP category, then the ASAP plan type, finally click the green plus (+) to launch the ASAP planning window.

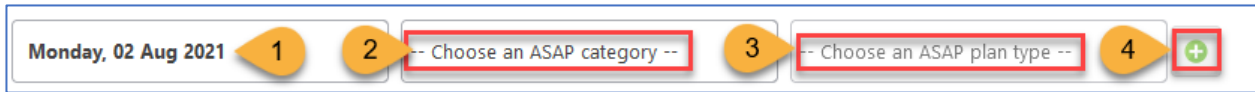
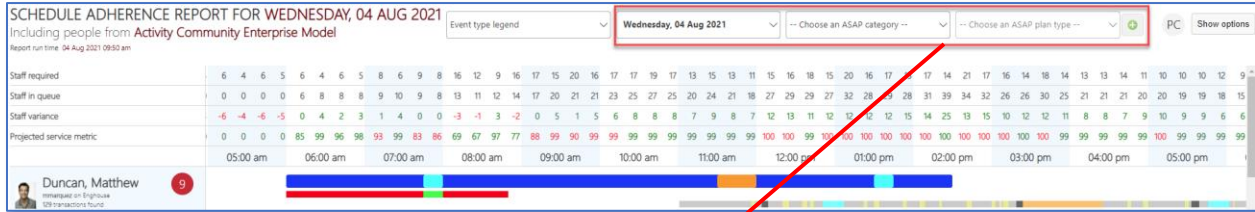


- From a **Daily Schedule Adherence Report** (Report > Schedule adherence > Daily schedule adherence > Enterprise model/Supervisor tree/Custom user group).





At the top of the page: select a date, then from the drop-down menu select the ASAP category, then the ASAP plan type, finally click the green plus (+) to launch the ASAP planning window.





Creating ASAPs

After selecting a plan type, you are ready to set up the parameters for the plan you wish to execute.





Green, yellow, and red button borders indicate items that you can edit (green), pending items (yellow), and items that you cannot configure until completing a prerequisite step or the step is complete and you cannot edit it (red).

ASAPs are automatically added to the ASAP calendar after configuration. The calendar view allows for drag-and-drop copying of an existing ASAP to a new day.





Creating all plans follows the same basic process:

1. Design the plan
 - a. Configure the basic properties (date, time, restrictions, etc.)
 - b. Select eligible event types (breaks, lunches, meetings, etc.)
 - c. Choose people (who will be eligible – by activity or supervisor)
2. Manage participant feedback (for some plans)
 - a. Open for feedback
 - b. Monitor feedback
 - c. View the response report (if agent acceptance is included)
 - d. Close feedback
3. Verify and execute the plan
 - a. View current schedules
 - b. Execute the plan
 - c. View results




Design the plan

-  Home
-  Basic properties
-  Select eligible event types
-  Choose people





Manage participant feedback

-  Open for feedback
-  Monitor feedback
-  View the response report
-  Close feedback

Verify and execute the plan

-  View current schedules
-  Execute the plan
-  View results

ASAP Extras

-  Customize notifications
-  Copy plan settings
-  Rescind plan
-  Delete the plan

The following sections describe configuration options for each plan in detail as well as how to use the calendar and other ASAP features.

Modify Current Schedule

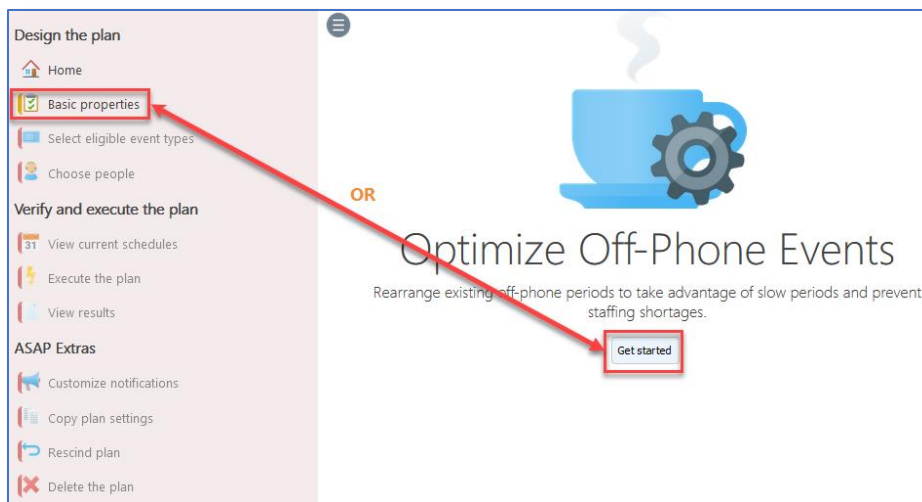
Optimize Off-phone Events

Use Optimize Off-phone Events to adjust the placement of scheduled events to account for intraday staffing variations. Optimize Off-phone Events is most commonly used to adjust breaks and lunches, but can work for a variety of other event types. Optimize Off-phone Events will analyze current staffing levels and try to place events in a more optimal time slot than their current placement.

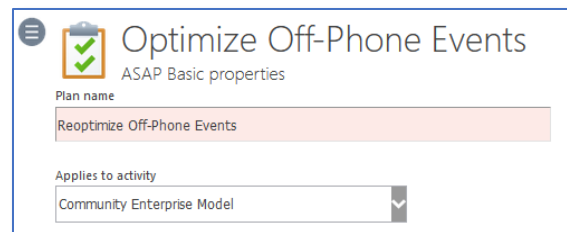
Navigate to ASAP Optimize Off-phone Events using one of the [three methods described](#).

Basic properties

1. Click *Get Started* in the middle of the page or *Basic properties* (note that all other buttons are red and greyed out, indicating that they cannot be configured until step 1 is complete).




2. **Plan name:** Enter a plan name.
3. **Applies to Activity:** Use to include schedules that have a specific activity assigned. For example, only include agents who have a specific activity assigned in their profile.





4. **Schedule date:** The date auto-populates with the day in the schedule you were on when you launched the ASAP (but you can change the date here if you need to).

Schedule date

1/18/2023 

5. Identify the window of time for the plan to look at to optimize breaks and/or lunches. Edit both *Modify events that start on or after* and *Modify events that end on or before*. For example: if we put 1 pm and 6 pm, the plan will optimize any events that start at or after 1 pm and before or at 6 pm.

Modify events that start on or after

:

Modify events that end on or before

:

6. The slider *Restrict change in start time to a maximum (in minutes)* tells the system how far it can move the break left or right. The minimum is 15 minutes. If you have an event at 1:30 pm and you set the slider to 15 mins, that optimized break could begin at 1:15 pm or 1:45 pm. If you set the slider to two hours, that optimized 1:30 pm break could be moved to 11:30 am or 3:30 pm. Consider keeping the range to 15–30 minutes. The number in parentheses to the right of the slider indicates the selected number of minutes.

Restrict change in start time to a maximum (in minutes)

30

7. **Minimum event start time buffer** will prevent the break from being placed right next to another event. If you leave as *None*, it could put the break right up against a published event such as a meeting or coaching. If you set it to 15 minutes, it will place it at least 15 minutes before or after any other event on the schedule.

Minimum event start time buffer

-- None --

-- None --

15 Minutes

30 Minutes

45 Minutes

60 Minutes

90 Minutes

6. **Restrict to people compatible with the selected agent template** allows customization of the plan. If the plan will apply to everyone leave this as -- No Selection--.
7. **Overlapping interval behavior settings** allows you to include or exclude events that start and/or end outside the selected time window. For example: Our event starts at 1:00 PM. A lunch starts at 12:45 pm and ends at 1:15 pm. If we *include* the overlapping activity, the plan will optimize the lunch. If we *exclude* overlapping activity, the plan will



exclude lunch optimization because it does not start at or after 1 pm. You can overlap for start time and end time of the plan independently.

Overlapping interval behavior settings

How should the plan adjust events that overlap the **start time** of the plan time range?

Include these intervals ▾

How should the plan adjust events that overlap the **end time** of the plan time range?

Exclude these intervals ▾

- Click *Save plan properties* to complete the configuration of the basic properties.

Select Eligible event types

- Click *Select eligible event types* or *Select event types* to tell the plan what types of events to optimize.

- In the pop-up, *Select All* or select individual events then click *Save*.

ASAP - Associate event types

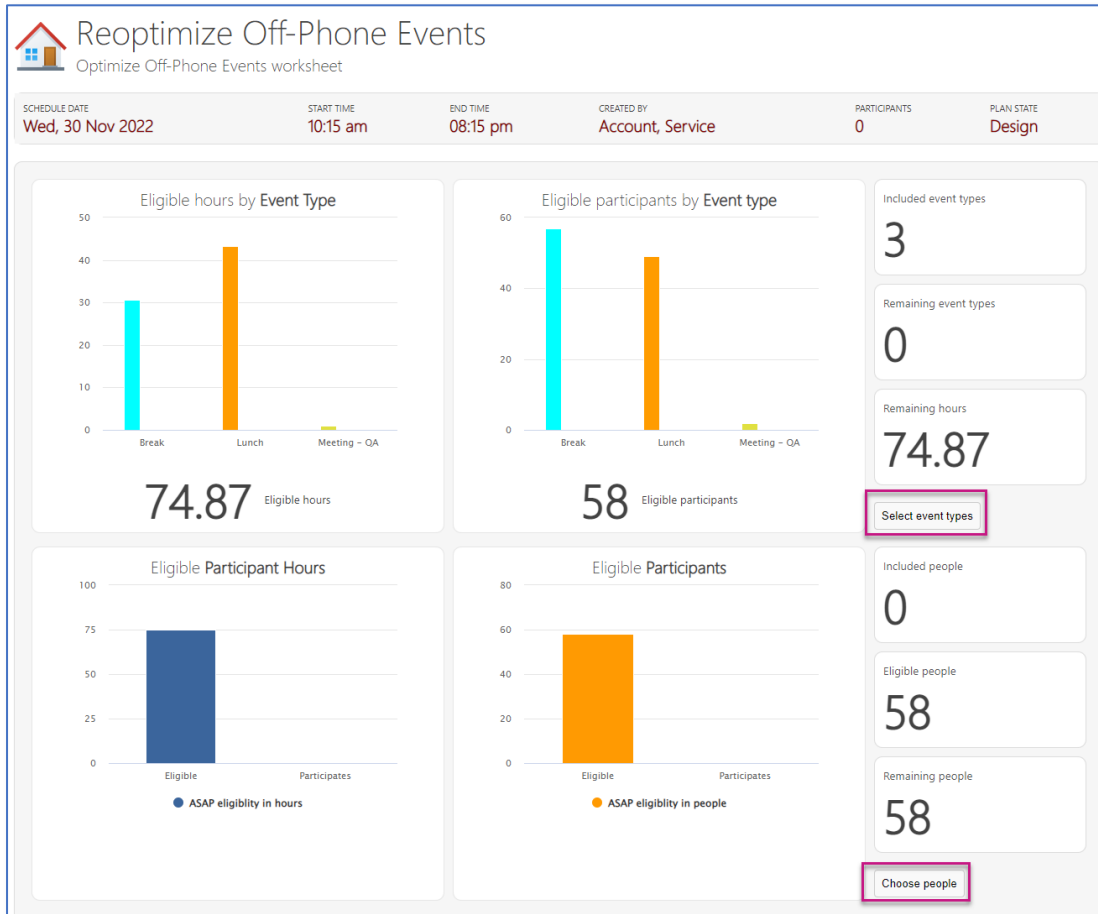
For plan **Reoptimize Off-Phone Events**
on schedule date **Monday, 02 August 2021 08:00 AM**

Select eligible event types

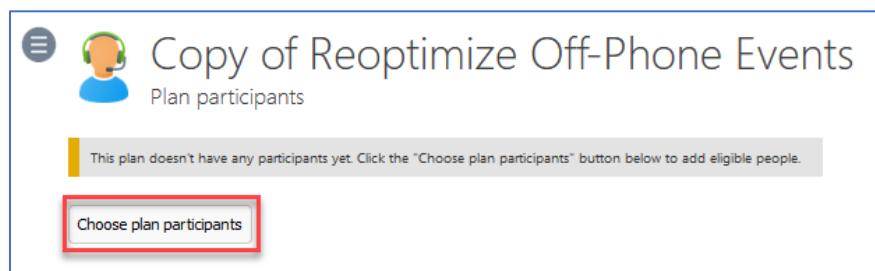
Id	Select?	Event type name	Display color
2	<input checked="" type="checkbox"/>	Break	■
3	<input checked="" type="checkbox"/>	Lunch	■
6	<input type="checkbox"/>	Meeting - QA	■



The chart will show you the total number of hours available for optimization. You can add additional event types (if not all were selected) or move on to selecting people.



11. Click *Choose people* on the events worksheet or on the left side menu then click *Choose plan participants*. In this example, the selection window will only display agents who have a break or lunch that falls between 1 pm and 4 pm.





12. Select one of the *Choose* buttons to select the candidates from Activity or Supervisor. Decide whether you want to filter for everyone in the enterprise model (or just an activity), **or** you can select a specific supervisor’s team.

Indicate whether to automatically update net line statistics. If you want to update your variance and expected service metrics at the top of your schedules, check the box to automatically update net line statistics.

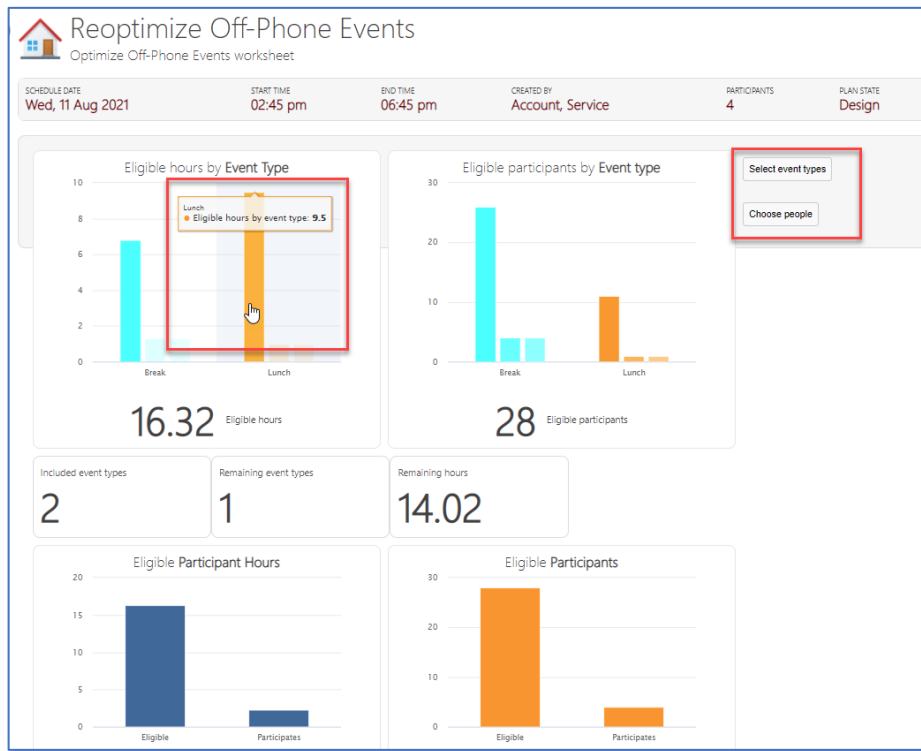
13. Once you determine the filter, you can choose to optimize all agents or just include a few. Click *Select all* or *Select none* and then refine your selection with *Remove* or *Include* next to each agent. For example: if there is someone with a medical condition that requires them to have breaks at a specific time, you would exclude them from the plan.

14. Make your selections then click *Finish*.

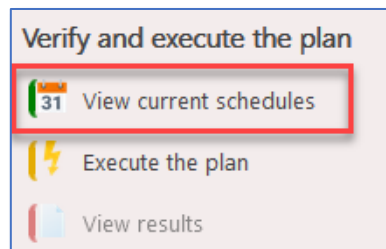
New graphs display eligible hours, eligible participants, and remaining eligible people. To increase the optimization, add additional people by clicking *Choose people* or adding additional events by clicking *Select event types*.



To view the graph legends, hover over the bars.

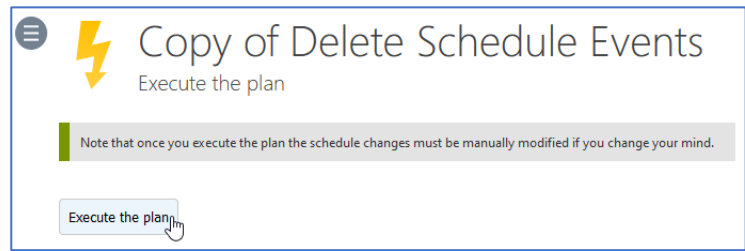
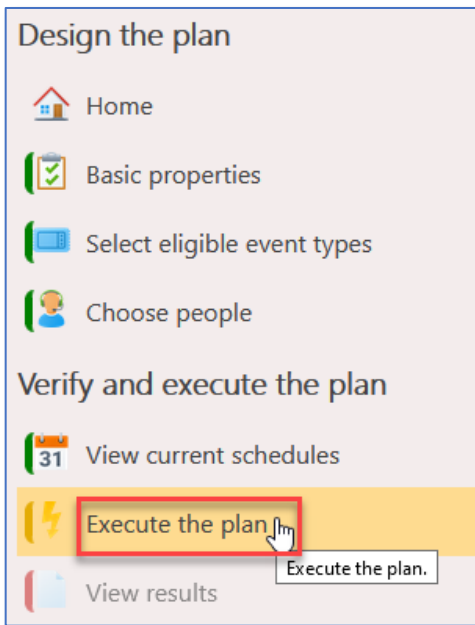


15. Prior to executing the plan, you can *View current schedules* to preview the effect of the ASAP.

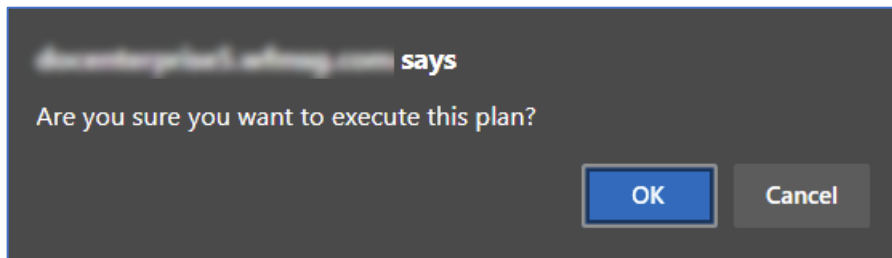




16. Click *Execute the plan*. When you execute the plan, it will analyze your coverage numbers and optimize the agents' schedules for your selected events (e.g., breaks and/or lunches).



17. Confirm that you want to execute the ASAP.



Note: *Once executed, you cannot undo the action.* For example, if you optimize breaks and lunches, you cannot revert the breaks and lunches to their original time by deleting the ASAP.

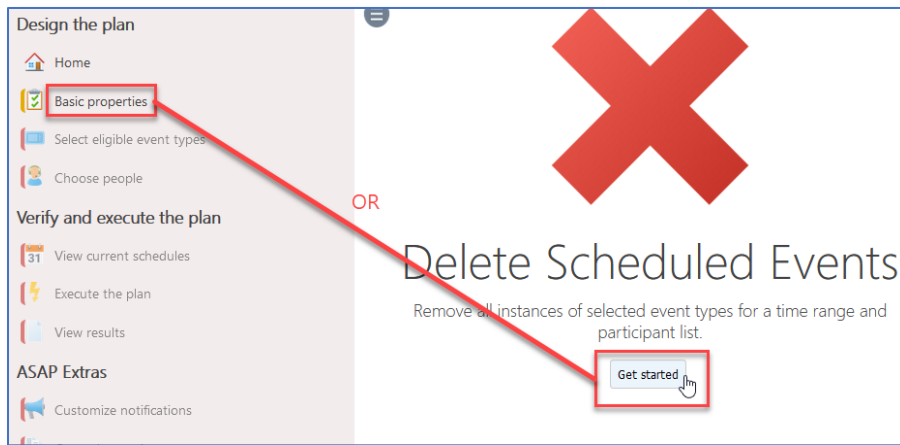


Delete Scheduled Events

This is the most basic ASAP. This plan will find and delete all qualified events from selected agent's schedules. Think of it as a "search and destroy" ASAP.

Navigate to ASAP Delete Scheduled Events using one of the [three methods described](#).

1. Click *Get Started* or *Basic properties* (you can't click on any other step until you have completed this).



2. **Plan name:** Give the plan a name.
3. **Applies to Activity:** Use to include schedules that have a specific activity assigned.

Delete Scheduled Events

ASAP Basic properties

Plan name

Applies to activity



- Schedule date:** The date auto-populates with the day in the schedule you were on when you launched the ASAP (but you can change the date here if you need to).
- Eligible shift boundary:** Identify the window of time for the plan to look at to remove events. Edit both *Start on or after* and *End on or before*. For example: if we put 2 pm and 6 pm, the plan will delete any selected events that start at or after 2 pm and end before or at 6 pm.
- Click *Save plan properties* to complete the configuration of the basic properties.

Schedule date
8/2/2021

Eligible shift boundary earliest
2 : 00 : PM

Eligible shift boundary latest
6 : 00 : PM

Save plan properties

- Upon saving, the *Select event types* window opens. Click *Select event types* then *Select event types* again.

SCHEDULE DATE	START TIME	END TIME	CREATED BY	PARTICIPANTS	PLAN STATE
Mon, 02 Aug 2021	02:00 pm	06:00 pm	Account, Service	0	Design

Eligible hours by Event Type

0.00 Eligible hours

Eligible participants by Event type

0 Eligible participants

Included event types


0

Remaining event types

18

Remaining hours

0.00



Delete Schedule Events

Member event types

This plan doesn't have any event types associated yet. Click the "Select event types" button below to associated event types.

Select event types



- All event types in your schedule will appear in the pop-up. Select the events you want to delete then click **Save**.

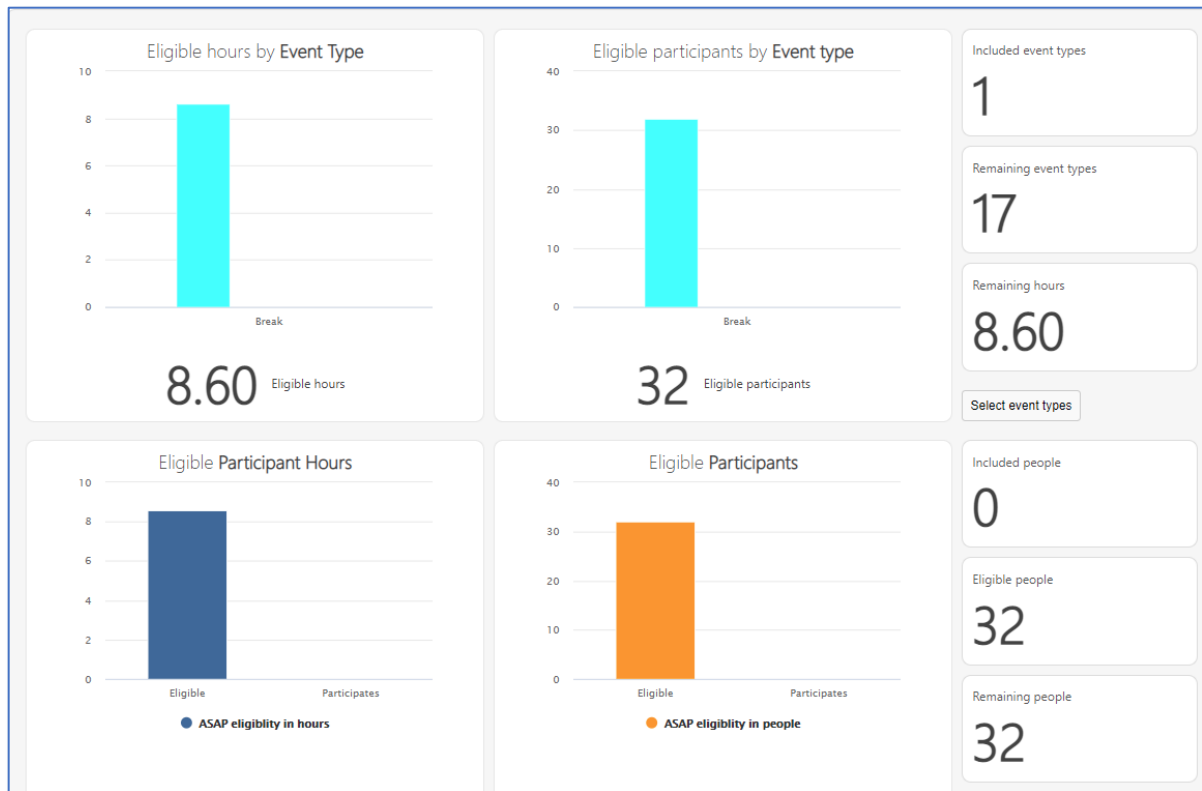
ASAP - Associate event types

For plan **Delete Schedule Events**
on schedule date **Monday, 02 August 2021 02:00 PM**

Select eligible event types

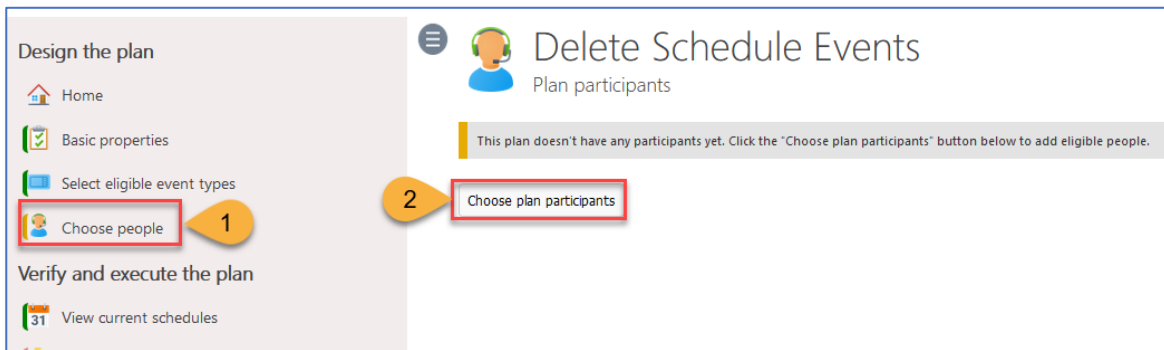
20	<input type="checkbox"/>	late occurrence in excess of 15 minutes	
15	<input type="checkbox"/>	LOA	
3	<input type="checkbox"/>	Lunch	
6	<input type="checkbox"/>	Meeting - QA	
10	<input checked="" type="checkbox"/>	Meeting - Team	
5	<input type="checkbox"/>	Overtime	

- The chart will show you the total number of hours selected for deletion and the number of eligible participants.



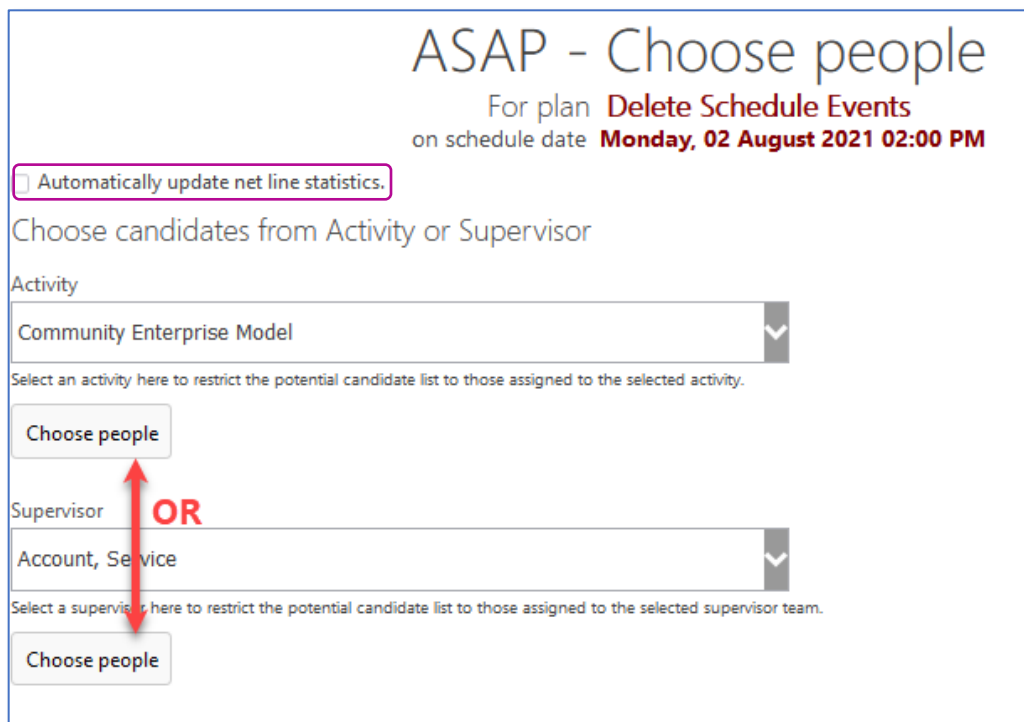


- Click *Choose people* then *Choose plan participants*. The system knows to present only the people who have specified events that fall between 2 pm and 6 pm.



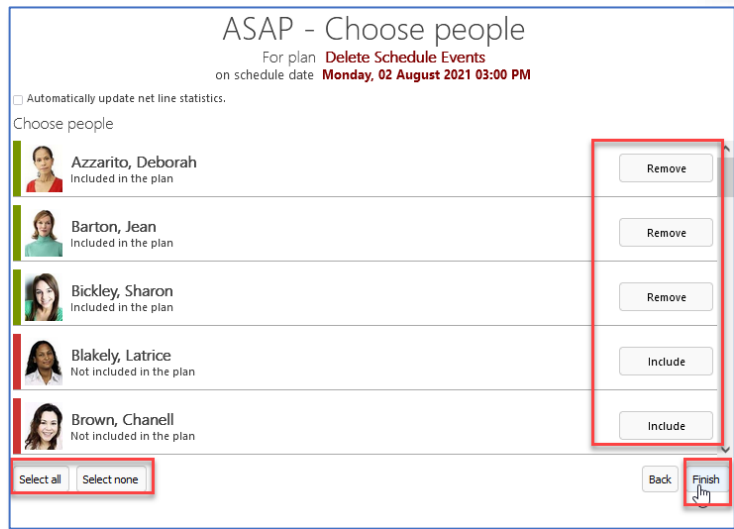
- Choose the candidates for the plan. Decide whether you want to filter for everyone in the enterprise model (or just an activity), or you can select a specific supervisor's team.

If you want to update your variance and expected service metrics at the top of your schedules, check the box to automatically update net line statistics.

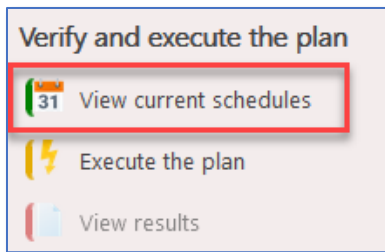




12. Once you determine the filter, you can choose to include all agents or just include a few. Click *Select all* or *Select none* and then refine your selection with *Remove* or *Include* next to each agent. For example: if your plan is removing breaks, and there is someone with a medical condition that requires them to have a break, you would exclude them from the plan. Make your selections then click Finish.



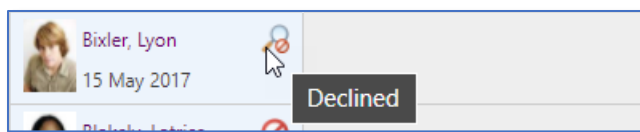
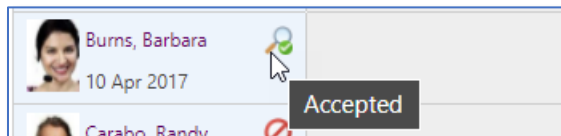
Prior to executing you can *View current schedules* to preview the effect of the ASAP.



The list of all agents and their schedules gives you the opportunity to see how executing the ASAP will affect the schedules.

Icons next to the agent names indicate if the agent is included/accepted (green check), response pending (question mark), declined (red X), excluded (red circle), or eligible but not included (yellow triangle).

	Bickley, Sharon	
	10 Jul 2017	
	Bixler, Lyon	
	15 May 2017	
	Burns, Barbara	
	10 Apr 2017	
	Carabo, Randy	
	13 Mar 2017	
	Dolinger, Joel	
	14 Nov 2016	





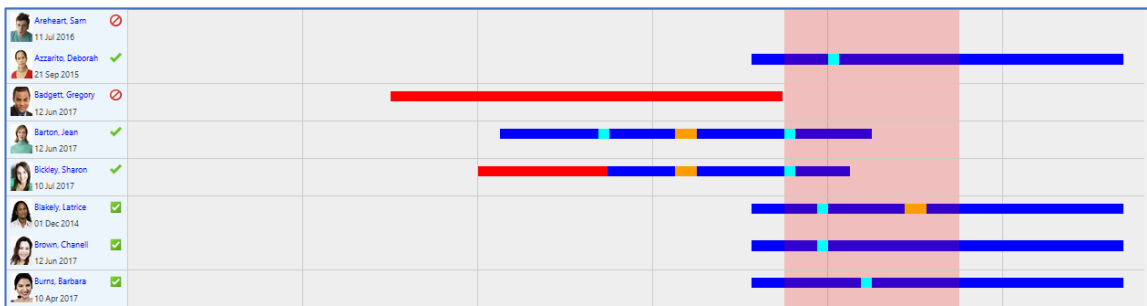
Blakely, Latrice
01 Dec 2014
This agent is not eligible for the adjustment plan.

Brown, Chanell
This agent is not eligible for the adjustment plan.

Finn, Mike
29 Jul 2013
The agent is eligible for the plan but is not identified as a participant.

Bickley, Sharon
10 Jul 2017
Pending

The pink shaded area in the schedule indicates the ASAP timeframe.



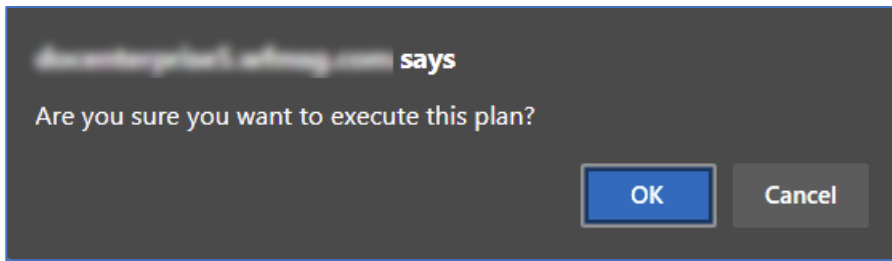
- Click *Execute the plan*. When you execute the plan, it will search for and delete all selected events within the specified time.

The screenshot shows the 'Delete Schedule Events' interface. On the left, there is a sidebar with the following options: Design the plan, Home, Basic properties, Select eligible event types, Choose people, Verify and execute the plan, View current schedules, Execute the plan (highlighted with a red box), and View results. On the right, the main area is titled 'Delete Schedule Events' and contains the text 'Execute the plan' and a note: 'Note that once you execute the plan the schedule changes must be manually modified if you change your mind.' The 'Execute the plan' button is highlighted with a red box and a mouse cursor.

When deleting events, the system will automatically delete the selected events from the agents' schedules. Agents will not have a choice when you delete a scheduled event.



Confirm that you want to execute the plan.



Note: *Once executed, you cannot undo the action.* For example, if you delete breaks and lunches, you cannot restore the breaks and lunches by deleting the ASAP.

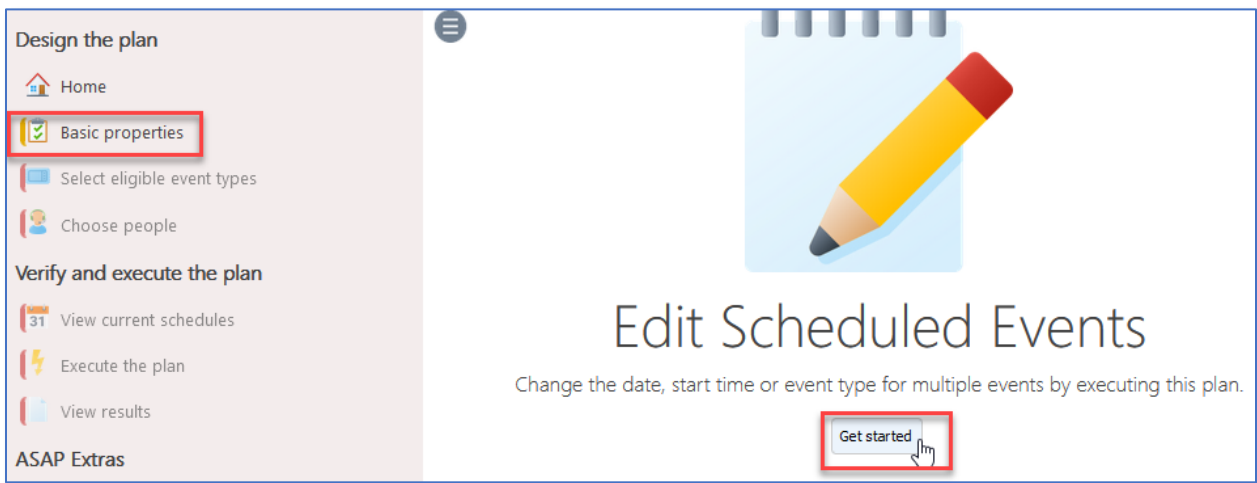


Edit Scheduled Events

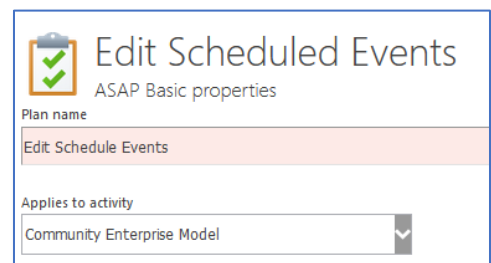
This ASAP allows you to edit qualified events by changing the date, time (fixed or relative), event type, or a combination of any or all items. For example: Move all coaching events for Spanish speaking agents that occur today between 1:00 pm and 4:00 pm to tomorrow between 12:00 pm and 3:00 pm.

Navigate to ASAP Edit Scheduled Events using one of the [three methods described](#).

1. Click *Get Started* or *Basic properties* (you can't click on any other step until you have completed this).



2. **Plan name:** Give the plan a name
3. **Applies to Activity:** Use to include schedules that have a specific activity assigned.



4. **Schedule date:** The date auto-populates with the day in the schedule you were on when you launched the ASAP (but you can change the date here if you need to).





- Modify events that start on or after / end on or before:** Identify the window of time for the plan to look at for the scheduled events. For example: if we put 1 pm and 6 pm, the plan will find any events that start at or after 1 pm and end before or at 6 pm.

Modify events that start on or after
 1 : 00 : PM

Modify events that end on or before
 6 : 00 : PM

- Edit start time:** You have the option of changing the time to a fixed time (e.g., change the event start from 1:00 pm to 3:00 pm) or change it to a relative time (change the event to one hour earlier, regardless of the original time).

If changing to a fixed time, enter the new time.

Edit start time

Start time option

Do not modify the start time

Do not modify the start time

Change to a fixed start time

Change to a relative time

Edit start time

Start time option

Change to a fixed start time

Do not modify the start time

Change to a fixed start time

Change to a relative time

New fixed start time

12 : 00 : AM

If changing to a relative time, use the slider to adjust the amount of time the plan should shift the event. The number in parenthesis to the right is the number of minutes the plan will shift the event (in this example, later by 60 minutes).

Edit start time

Start time option

Change to a relative time

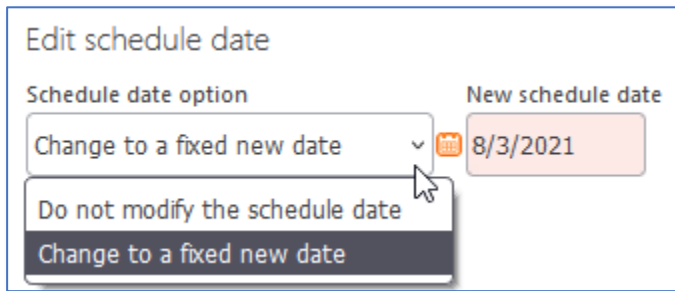
Relative start time (in minutes)

-120

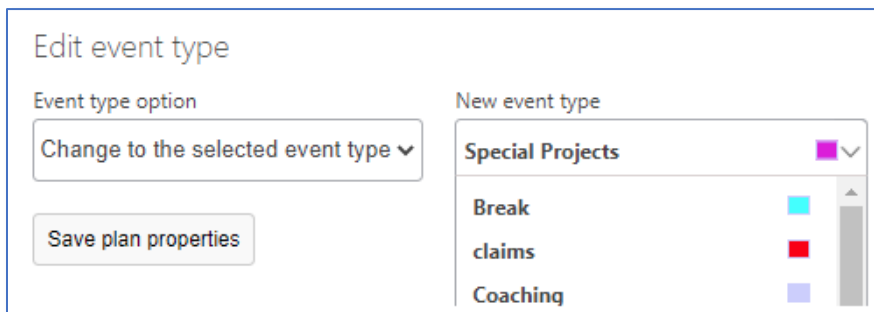
120 [60]



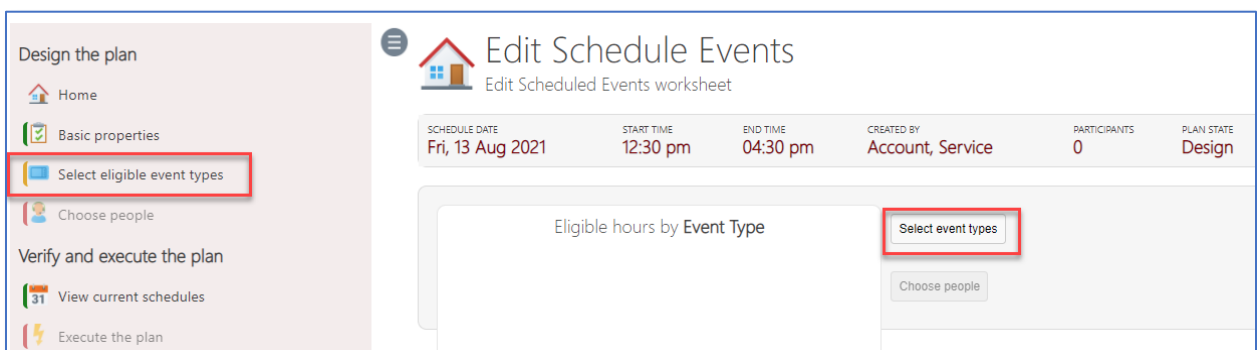
- Edit schedule date:** You can keep the event on the same day or move it to a new day. To change to a new date, click on the calendar and select the day.



- Edit event type:** *Do not modify the event type* will leave the event type as is. *Change to the selected event type* gives you the option of changing it to a new event type.

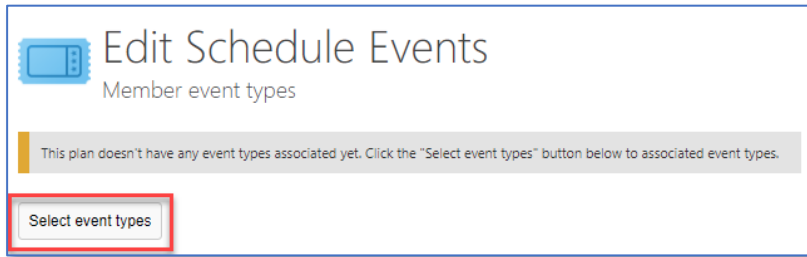


- Click *Save plan properties* to complete the configuration of the basic properties.
- Upon saving, the *Select event types* window opens. Click *Select eligible event types* or *Select event types*.

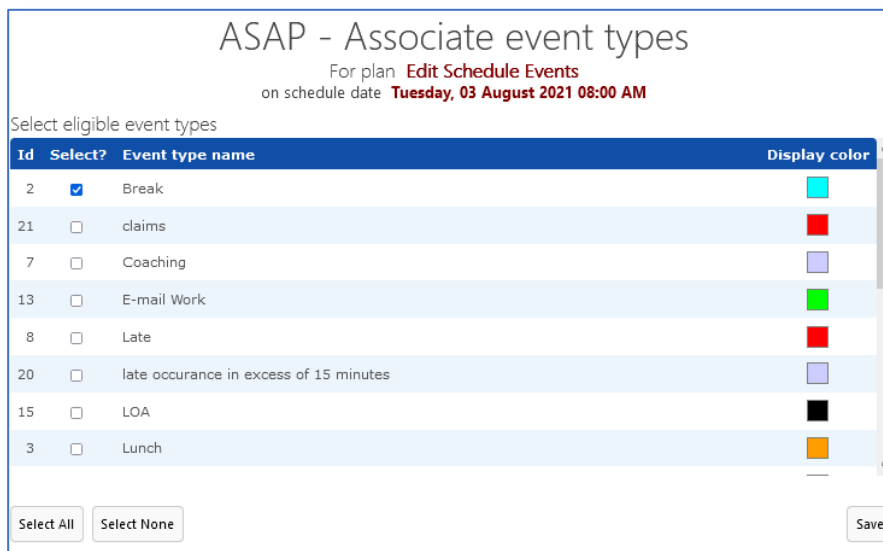




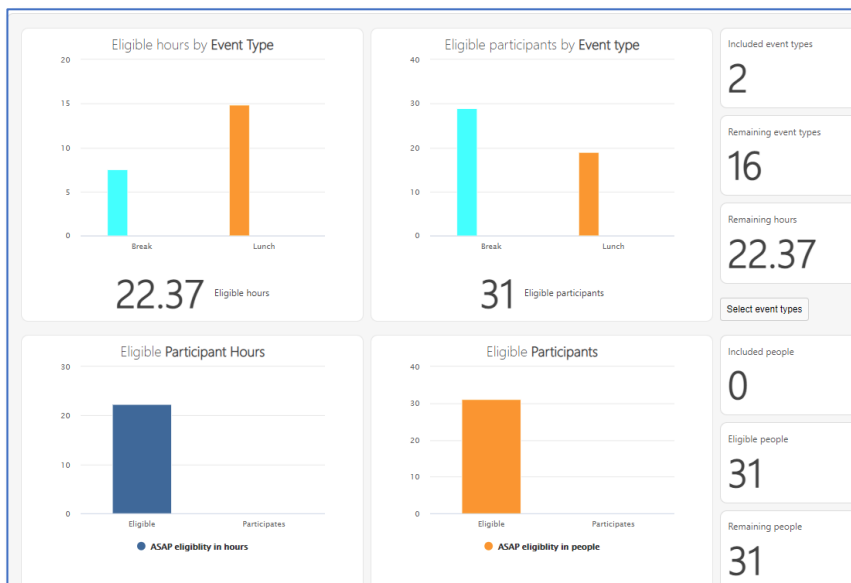
11. Click Select event types to open the list of events.



12. All event types in your schedule will appear in the pop-up. Select the events you want to edit or move then click Save.

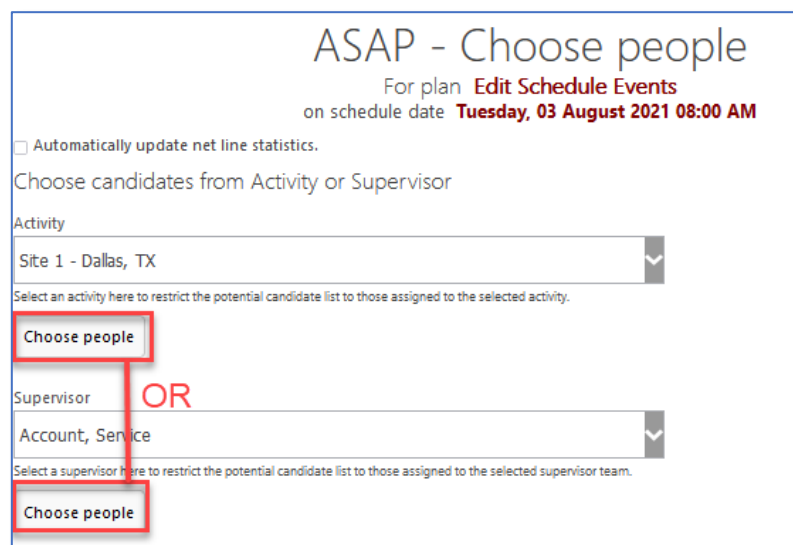
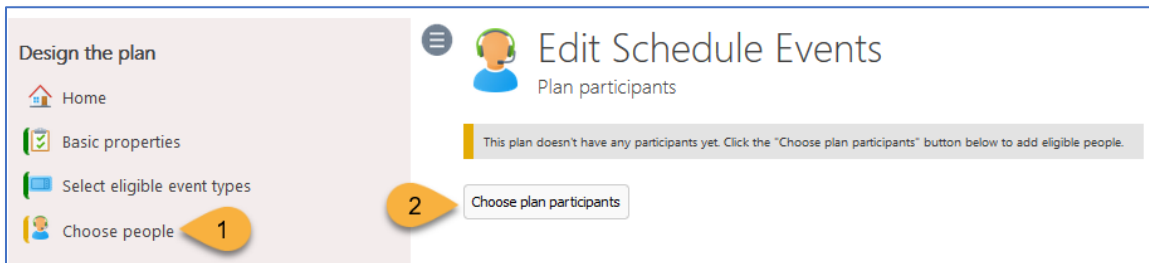


The graphs will refresh with the number of eligible participants and eligible hours.





- Click *Choose people* then on the Plan participants screen select *Choose plan participants*. The system knows to present only the people who have specified events that fall within the selected times.



- Choose the candidates. Decide whether you want to filter for everyone in the enterprise model (or just an activity), or you can select a specific supervisor's team.
- Once you determine the filter, you can choose to edit the event for all agents or just include a few. Click *All* or *None* and then refine your selection with *Remove* or *Include* next to each agent. In most cases you would include everyone such as when you are rescheduling or canceling a meeting.
If you want to update your variance and expected service metrics at the top of your schedules, check the box to *automatically update net line statistics*.



Click *Finish* after selecting all of your agents.

ASAP - Choose people

For plan [Edit Schedule Events](#)
on schedule date **Tuesday, 03 August 2021 08:00 AM**

Automatically update net line statistics.

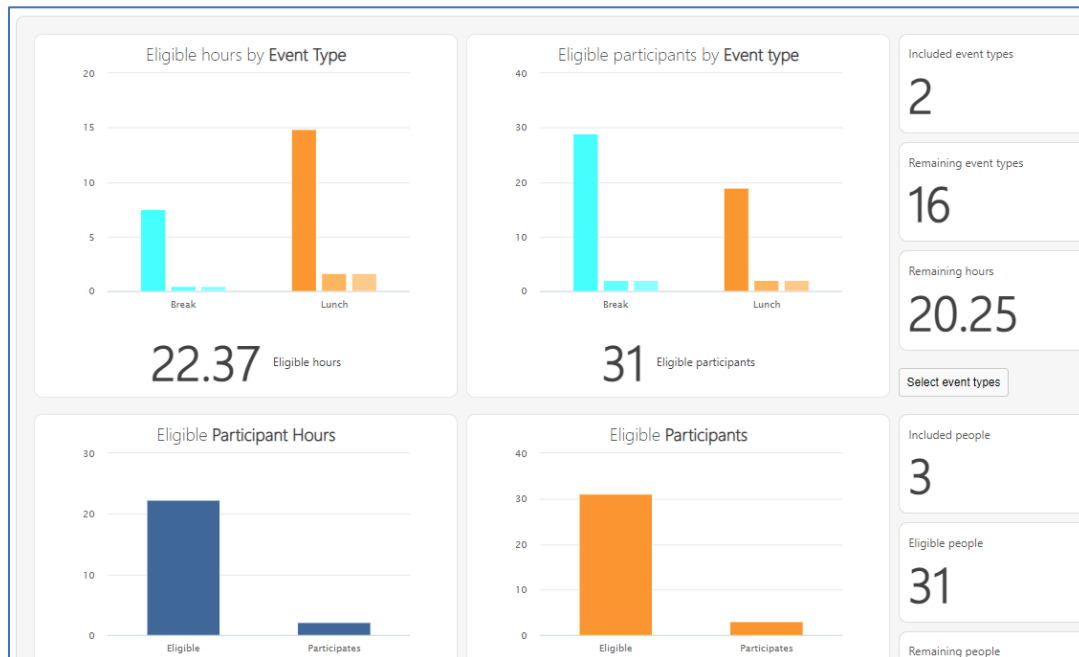
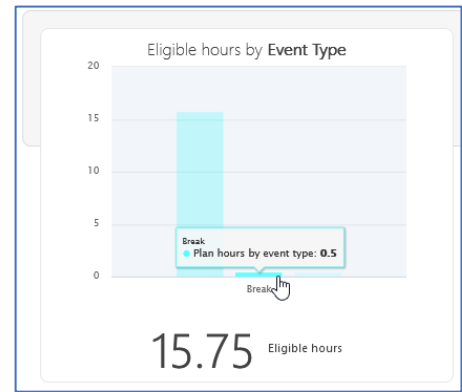
Choose people

	Bickley, Sharon <small>Included in the plan</small>	Remove
	Florez, Oscar <small>Included in the plan</small>	Remove
	Griffin, John <small>Included in the plan</small>	Remove
	Guzman, Denise <small>Not included in the plan</small>	Include
	Hunter, Satika <small>Not included in the plan</small>	Include

Select all Select none Back **Finish**

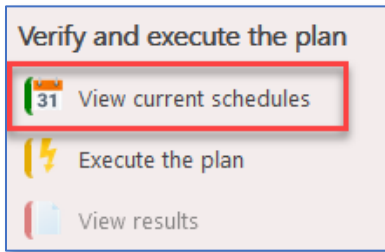
New graphs display eligible hours, selected participants, and remaining eligible people. To increase the optimization, add additional people by clicking *Choose people* or adding additional events by clicking *Select event types*.

To view the graph legends, hover over the bars.





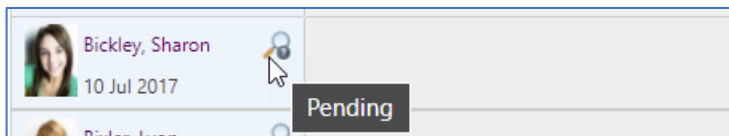
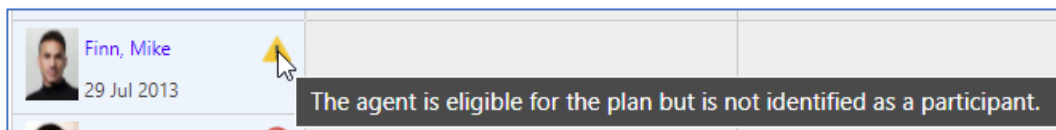
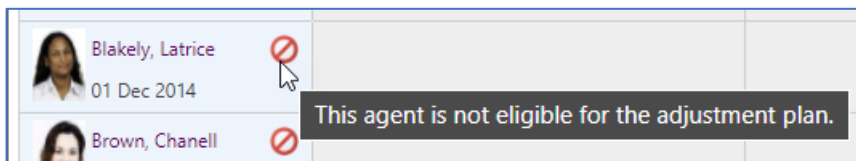
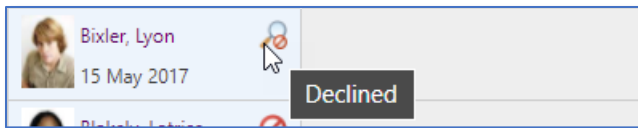
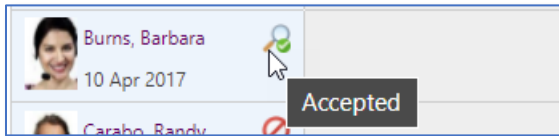
Prior to executing you can *View current schedules* to preview the effect of the ASAP.



The list of all agents and their schedules gives you the opportunity to see how executing the ASAP will affect the schedules.

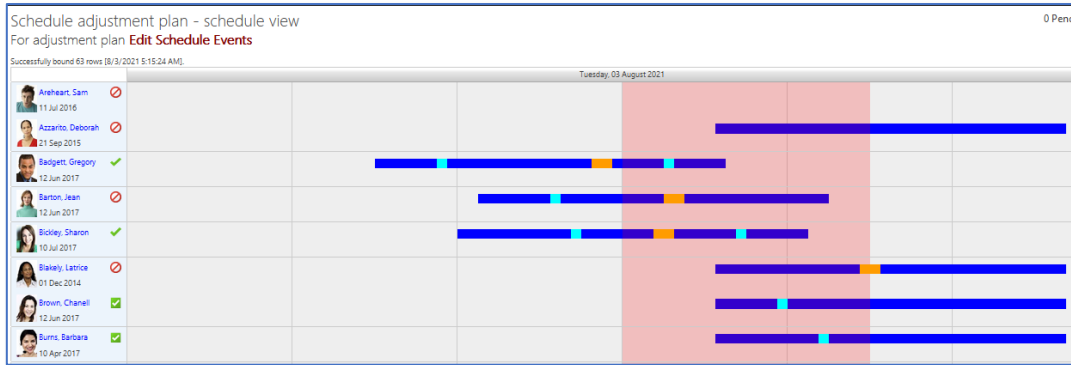
Icons next to the agent names indicate if the agent is included/accepted (green check), response pending (question mark), declined (red X), excluded (red circle), or eligible but not included (yellow triangle).

	Bickley, Sharon 10 Jul 2017	
	Bixler, Lyon 15 May 2017	
	Burns, Barbara 10 Apr 2017	
	Carabo, Randy 13 Mar 2017	
	Dolinger, Joel 14 Nov 2016	

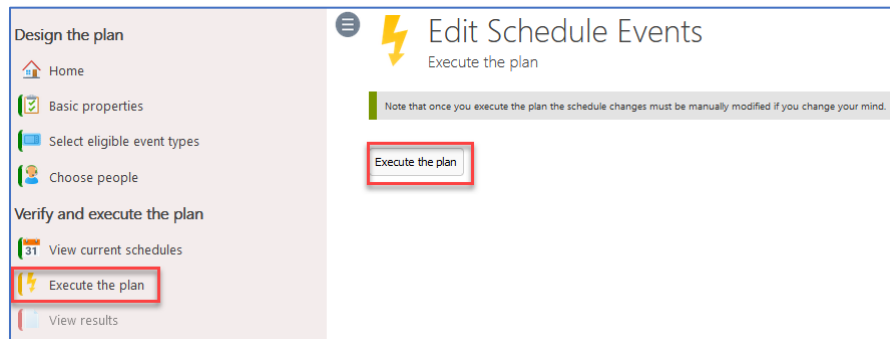




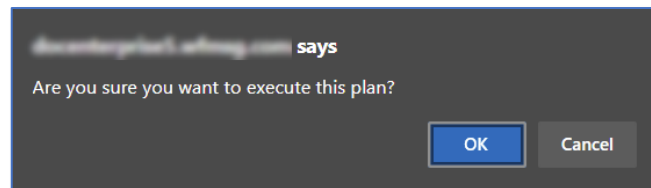
The pink shaded area in the schedule indicates the ASAP timeframe.



16. Click *Execute the plan* in either location. When you execute the plan, it searches for and edits all selected events within the specified times.

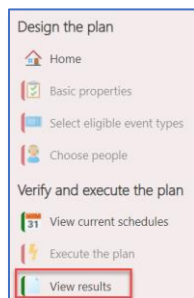


17. Confirm that you want to execute the plan.



Note: *Once executed, you cannot undo the action.* For example, if you move meetings to a future date, you cannot restore the meetings to the original date by deleting the ASAP.

18. Select *View results* to see a table of the changes created by the ASAP.



ASAP Execution Status Report
For adjustment plan **Edit Schedule Events**

	Agent Name	Event Type	Original Description	Adjusted Start	Adjusted End	Duration	Created By
✓	453 Badgett, Gregory	Break	Off phone interval	Tuesday, 03 Aug 2021 02:00 PM	Tuesday, 03 Aug 2021 02:15 PM	0.25	Account, Service
✓	479 Bickley, Sharon	Break	Off phone interval	Tuesday, 03 Aug 2021 03:45 PM	Tuesday, 03 Aug 2021 04:00 PM	0.25	Account, Service



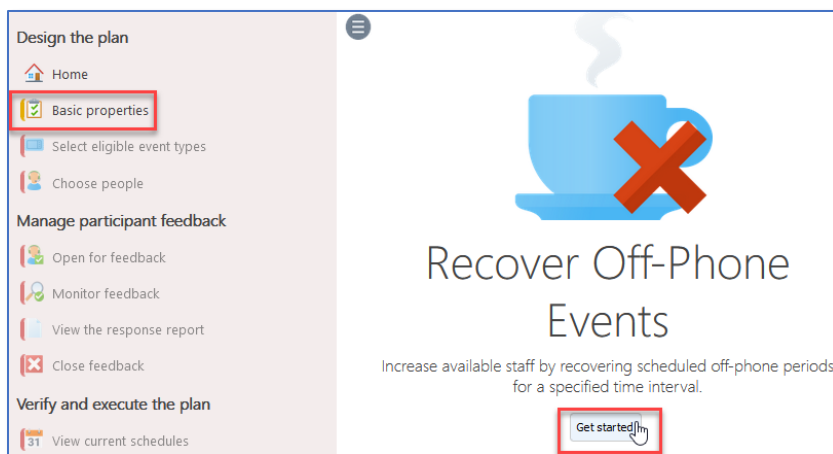
Increase Available Staff

Recover Off-Phone Events

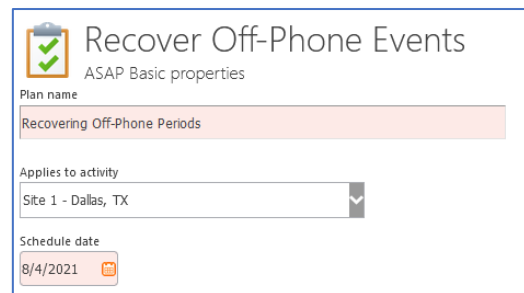
Identify qualified events and agents and replace, delete, or modify events with contact work. This plan includes the option for agent acceptance and allows you to customize the number of agents who can accept the plan. For example: Allow Spanish agents who opt-in to replace lunch events that occur between 1:00 pm and 6:00 pm with email work, but no more than 10 agents can accept.

Navigate to ASAP Recover Off-Phone Events using one of the [three methods described](#).

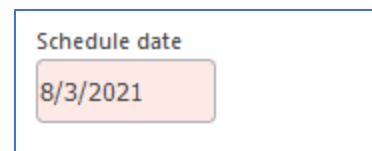
1. Click *Get Started* or *Basic properties* (you can't click on any other step until you have completed this).



2. **Plan name:** Give the plan a name.
3. **Applies to Activity:** Use to include schedules that have a specific activity assigned.



4. **Schedule date:** The date auto-populates with the day in the schedule you were on when you launched the ASAP (but you can change the date here if you need to).





5. **Eligible shift boundary earliest / latest:** Identify the window of time for the plan to look at to recover events. Edit both *Eligible shift boundary earliest* and *Eligible shift boundary latest*. For example: if we put 1 pm and 6 pm, the plan will look within shifts that start at or after 1 pm and end at or before 6 pm.

Eligible shift boundary earliest

1 : 00 PM

Eligible shift boundary latest

6 : 00 PM

6. **Restrict to people compatible with the selected agent template** allows customization of the plan. If the plan will apply to everyone leave this as -- No Selection--.

7. **Eligible event type filter:** Select whether to filter the plan to show only events previously designated as available for callback. When creating events there is an option to designate the event as allowing agents to be called back into the queue.

Eligible event type filter

Do not filter eligible event types by "Available for callback to queue" ✓

Do not filter eligible event types by "Available for callback to queue"

Select only event types that are "Available for callback to queue"



8. **How do you want to perform the event recovery?** Select whether to delete/modify the original event, or replace the event with a new type.

How do you want to perform the event recovery?

Recover hours by deleting or modifying the original schedule event.

Recover hours by deleting or modifying the original schedule event.

Recover hours by replacing the original schedule event with an event of the selected type.

OR

How do you want to perform the event recovery?

Recover hours by replacing the original schedule event with an event of the selected type.

Event type

- E-mail Work ■
- E-mail Work** ■
- Overtime ■
- Work ■

9. **Overlapping interval behavior settings:** Select the settings for events that overlap the start time, overlap the end time, or span the entire duration of the plan. For example, if an agent has lunch scheduled from 1:00 pm to 2:00 pm and the plan starts at 1:30, do you include the lunch in the plan? Selecting *End Early* will end the lunch at 1:30 and recover the rest of the time in the plan. *Include Entire Event* will act as if the entire event is within the start/end window of the plan and will recover the time for the entire event. *Ignore* will not include the event in the plan.

Overlapping interval behavior settings

How should the plan adjust events that overlap the **start time** of the plan time range?

Ignore

How should the plan adjust events that overlap the **end time** of the plan time range?

Ignore

How should the plan adjust events that **span the entire duration** of the plan time range?

Ignore



Participant acceptance settings

10. Do plan participants have to accept the plan?

If *No*, participants are automatically included in the plan, it will execute the change without agent approval. Think of it as a “voluntold” rather than “volunteer.”

If *Yes*, participants must accept the plan prior to execution, agents must accept the change before it can be executed.

If *Yes*, you will see additional options to indicate whether to execute the change immediately (this allows you to automate the execution of the plan), and whether there should be a minimum and/or maximum total number of participants for this plan. **Note:** If checking the box to immediately execute the schedule change, you cannot specify a minimum number of participants (but you can still have a maximum).

Participant acceptance settings

Do plan participants have to accept the plan?

No, participants are automatically included in the plan. ▾

No, participants are automatically included in the plan.

Yes, participants must accept the plan prior to execution.

Participant acceptance settings

Do plan participants have to accept the plan?

Yes, participants must accept the plan prior to execution. ▾

Do you want to execute the plan immediately on acceptance?

No, execute the plan for all participants at the end of the feedback period. ▾

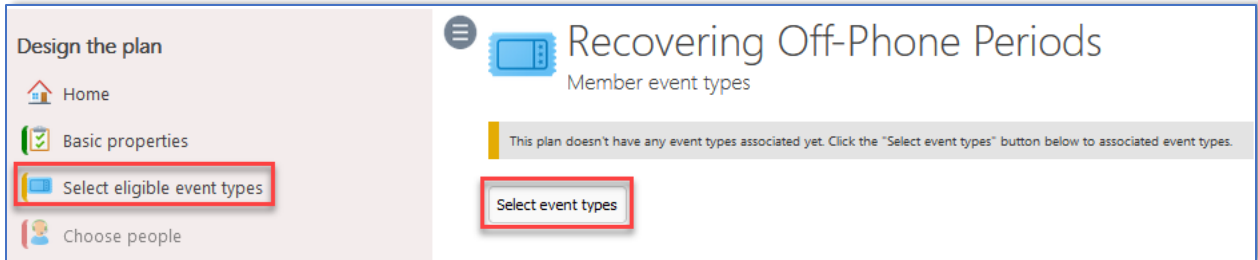
Minimum participant count (blank means no minimum)

Minimum participant count (blank means no maximum)

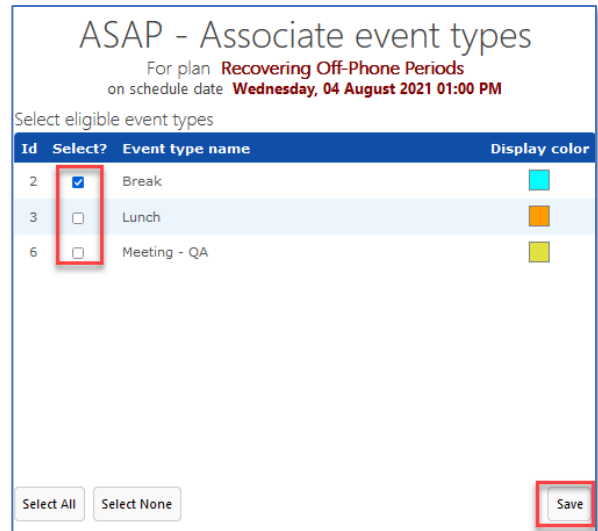
11. Click *Save plan properties* to complete the configuration of the basic properties.



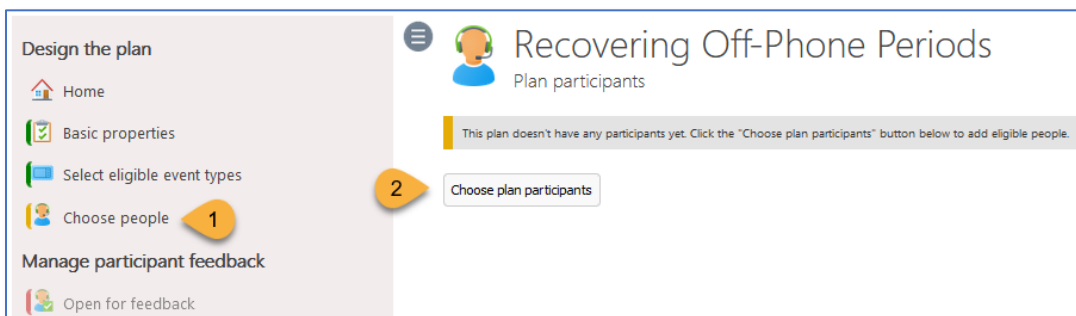
12. Upon saving, the *Select event types* window opens. Click *Select eligible event types* or *Select event types*.



13. In the pop-up, select the eligible event types to tell the plan what types of events to recover then click *Save*.

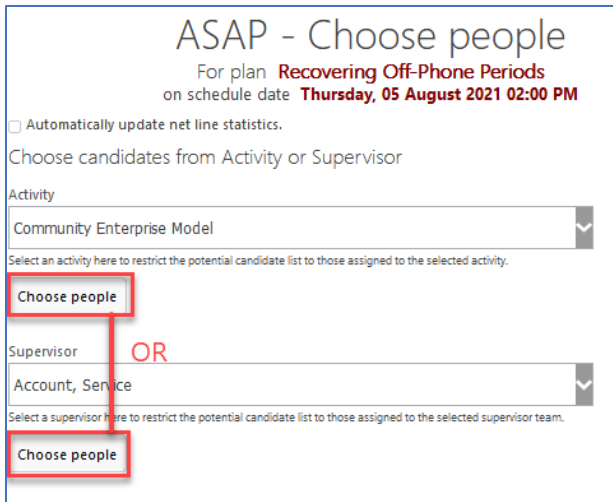


14. . Click *Choose people* then on the Plan participants screen select *Choose plan participants*. The system knows to present only people who have specified events that fall between the selected times.

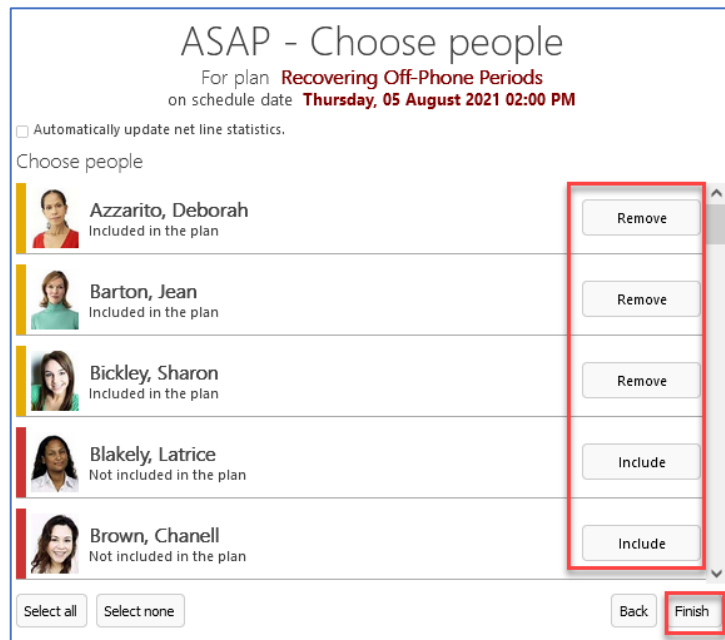




- Choose the candidates. Decide whether you want to filter for everyone in the enterprise model (or just an activity), or you can select a specific supervisor's team.

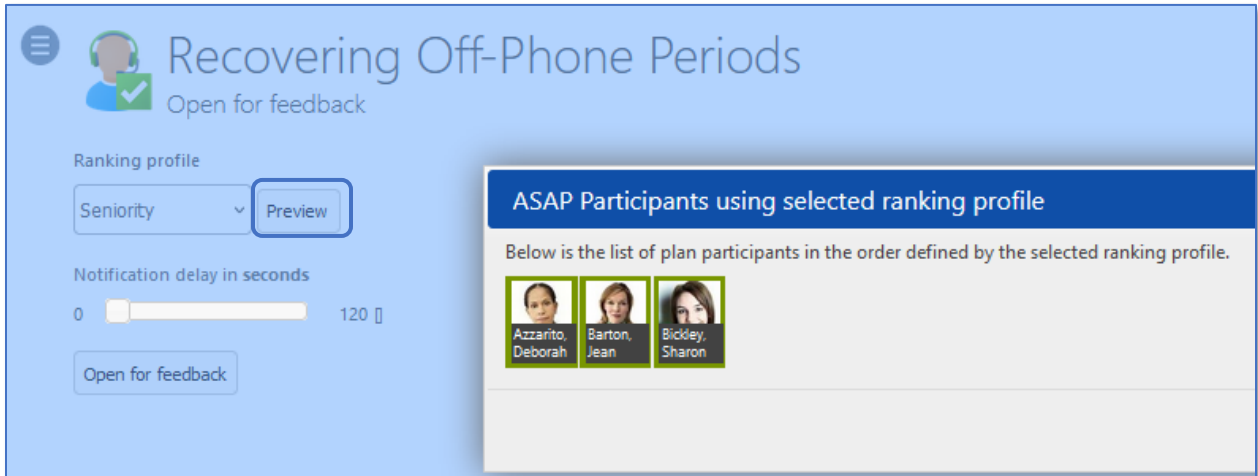


- Once you determine the filter, you can choose to include all agents or just include a few. Click *Select all* or *Select none* and then refine your selection with *Remove* or *Include* next to each agent. For example: if your plan is calling people back from breaks, and there is someone with a medical condition that requires them to have breaks, you would exclude them from the plan. Those not selected have a red border. If you require agent acceptance before executing the plan, agents will have a yellow border. Make your selections then click *Finish*.

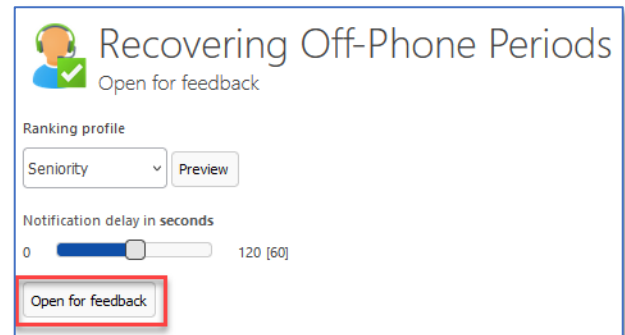




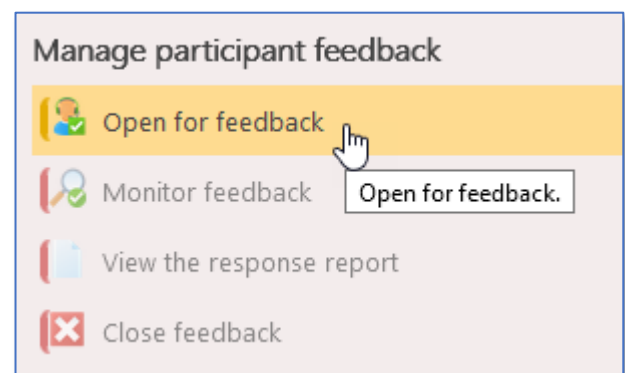
After selecting the agents, you must decide whether the ASAP will be distributed to everyone at once, or if some agents receive the notification first based on your previously defined ranking profile (seniority, performance ranking, etc.). Select *Preview* to see the ranking profile.



You can choose how long each agent will have before the ASAP is presented to the next agent when you use a ranking profile. If you have lots of eligible agents, consider keeping the notification delay to a very short time or agents might be receiving notifications two days later! The delay slider is in seconds (not minutes).

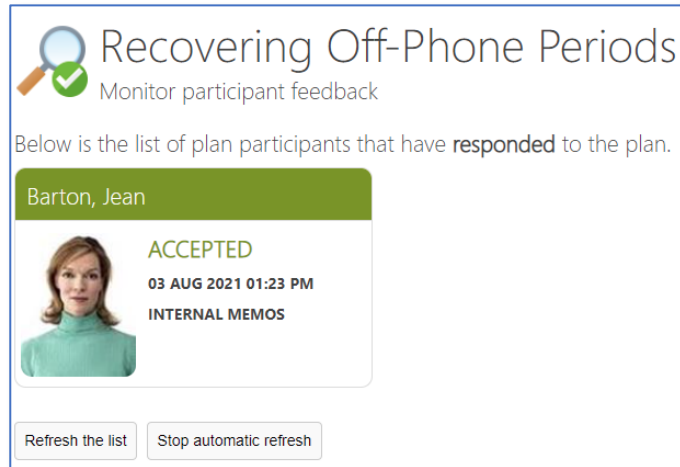


17. Click *Open for feedback* to distribute the ASAP to the agents.
18. You can follow the rates of acceptance on the *Monitor feedback* dashboard or select *View the response report* to view individual agent responses.



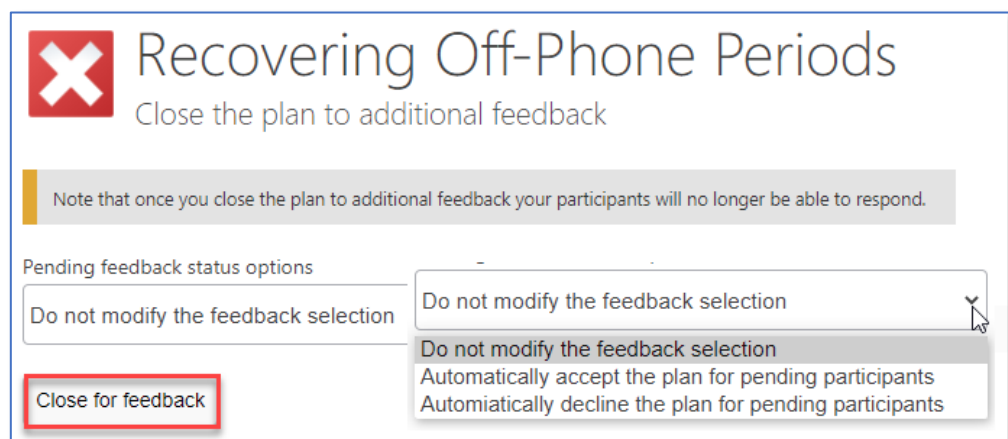


If you indicated a maximum number of agents who can accept the plan, the plan will stop approving new agents as soon as that number is reached. Any additional agents who try to accept the plan will receive a message that the maximum has been reached and it is no longer available, e.g., *Thank you for accepting the proposed schedule adjustment program on 11 Aug 2021. However, the maximum number of respondents has been reached, so you will not be included in this plan's execution.*



If you did not select a maximum number, or decide to close the plan early, select *Close for feedback*.

- When you are ready to *Close for feedback*, indicate what the ASAP should do for any pending feedback (the agent has not replied), then click *Close for Feedback*.
Do not modify the feedback selection will not make any changes to the agent's schedule.
Automatically accept the plan for pending participants will accept the plan.
Warning: if you select this option, it will override any quotas. E.g., if you set a maximum of 3 participants, 3 accepted, and there are 4 pending, it will include all who accepted plus the 4 pending.



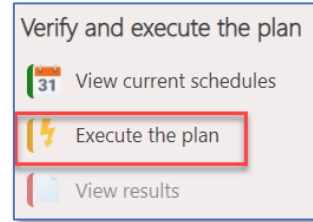
Automatically decline the plan for pending participants will decline the plan.



20. Execute the plan after you have received all feedback or closed the plan for additional feedback.

Note: If you selected the option to execute the plan upon acceptance, you will not need to do this step.

Note: Once executed, you *cannot* undo the action by deleting the ASAP.



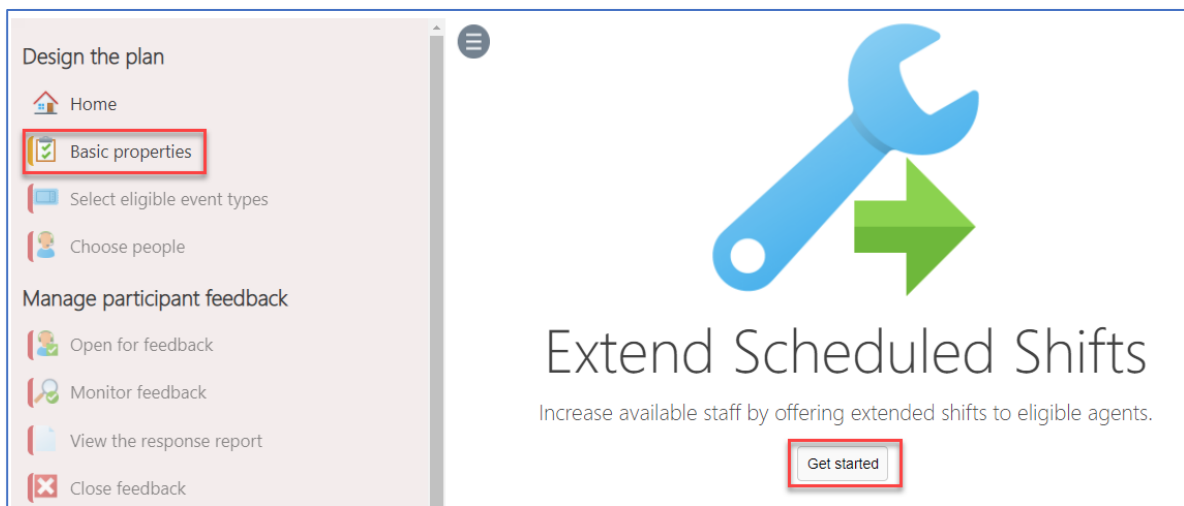


Extend Scheduled Shifts

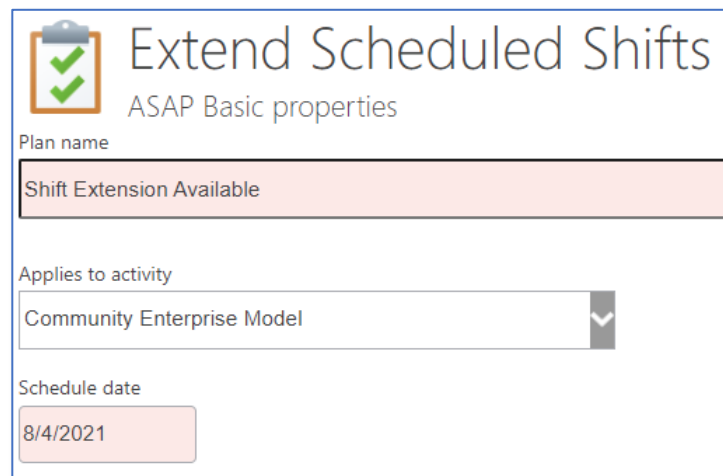
Add or offer targeted extra hours to the start or end of the agent’s schedule for those who already have shifts available. For example: Extend a shift until 4:00 pm or for one hour for any agent whose shift ends between 3:00 and 4:00 pm. Extend shifts allows the option for agent acceptance and maximum participants. **Note:** Agents without a schedule for that day will not be eligible.

Navigate to ASAP Extend Scheduled Shifts using one of the [three methods described](#).

1. Click *Get Started* or *Basic properties* (you can’t click on any other step until you have completed this).



2. **Plan name:** Give the plan a name. (Consider not including “overtime” in the plan name if there are agents who won’t accrue overtime pay if they accept the plan).
3. **Applies to Activity:** Use to include schedules that have a specific activity assigned.
4. **Schedule date:** The date auto-populates with the day in the schedule you were on when you launched the ASAP (but you can change the date here if you need to).





5. **Eligible shift boundary earliest / latest:** Identify the window of time for the plan to look at to extend the shifts. Edit both *Eligible shift boundary earliest* and *Eligible shift boundary latest*. For example: if we put 1 pm and 6 pm, the plan will look for shifts that start at or after 1 pm and end at or before 6 pm.

Eligible shift boundary earliest

1 ▾ : 00 ▾ : PM ▾

Eligible shift boundary latest

6 ▾ : 00 ▾ : PM ▾

6. **Restrict to people compatible with the selected agent template** allows customization of the plan. If the plan will apply to everyone leave this as -- No Selection--.
7. **How do you want to extend the shift?** Select whether to extend shifts by modifying the original event (with this option you lose visibility of adding overtime hours), or creating new events of a selected type (then select the event type). The later option will show the shift as, for example, an 8-hour shift with 2 hours of overtime, rather than extending the shift to be a 10-hour shift.

How do you want to extend the shift?

Extend shifts by modifying the original event.

Extend shifts by modifying the original event.

Create new events of the selected type.

8. Select the *Late departure behavior* and *Early arrival behavior*. As a rule, do not include both; create a new plan if you need to extend the beginning **and** end of a shift. This will determine whether agents will work a specified amount of time before or after the shift (e.g., 2 hours — all shifts ending at 6:00 pm will now end at 8:00 pm; all shifts ending at 5:00 pm will now end at 7:00 pm), or if there will be a fixed time for all agents (all shifts extend to 8:00 pm).

Late departure behavior

Late departure behavior

Late departure behavior option

Ignore participants eligible for late departure.

Ignore participants eligible for late departure.

Specify a fixed late departure time.

Specify a relative late departure time (in minutes).



- Specify a relative departure time (in minutes): use the slider to select how long the agent will stay relative to the end of their shift. For example, if a shift ends at 1:00 pm and we select 120 minutes, the agent now leaves at 3:00 pm.

Late departure behavior

Late departure behavior option

Specify a relative late departure time (in minutes). ▾

Relative late end time (in minutes)

15 360 [60]

- Specify a fixed late departure time for eligible participants: enter the time to extend the shift to that time for all participants. For example, if you set it to 8:00 pm the agent whose shift ended at 1:00 pm now stays until 8:00 pm.

Late departure behavior

Late departure behavior option

Specify a fixed late departure time. ▾

Fixed late departure time

8 ▾ : 00 ▾ : PM ▾

Early arrival behavior

Early arrival behavior

Early arrival behavior option

Ignore participants eligible for early arrival. ▾

Ignore participants eligible for early arrival.

Specify a fixed early arrival time.

Specify a relative early arrival time (in minutes).



- Specify a relative early arrival time (in minutes): use the slider to select how early the agent will arrive relative to the beginning of their shift. For example, if a shift begins at 1:00 pm and we select 60 minutes, the agent now arrives at 12:00 pm.

Early arrival behavior

Early arrival behavior option

Specify a relative early arrival time (in minutes). ▼

Relative early start time (in minutes)

15 360 [60]

- Specify a fixed early arrival time for eligible participants: enter the time to extend the shift to that time for all participants. For example, if you set it to 8:00 am, the agent whose shift begins at 1:00 pm now arrives at 8:00 am.

Early arrival behavior

Early arrival behavior option

Specify a fixed early arrival time for eligible participants ▼

Fixed early arrival time

8 : 00 AM

Participant acceptance settings

- Do plan participants have to accept the plan?**

If *No*, participants are automatically included in the plan, it will execute the change without agent approval. Think of it as a “voluntold” rather than “volunteer.”

If *Yes*, participants must accept the plan prior to execution, agents must accept the change before it can be executed.

If *Yes*, you will see additional options to indicate whether to execute the change immediately (this allows you to automate the execution of the plan), and whether there should be a minimum and/or maximum total number of participants for this plan. **Note:** If checking the

Participant acceptance settings

Do plan participants have to accept the plan?

No, participants are automatically included in the plan. ▼

No, participants are automatically included in the plan.

Yes, participants must accept the plan prior to execution.



box to immediately execute the schedule change, you cannot specify a minimum number of participants (but you can still have a maximum).

Participant acceptance settings

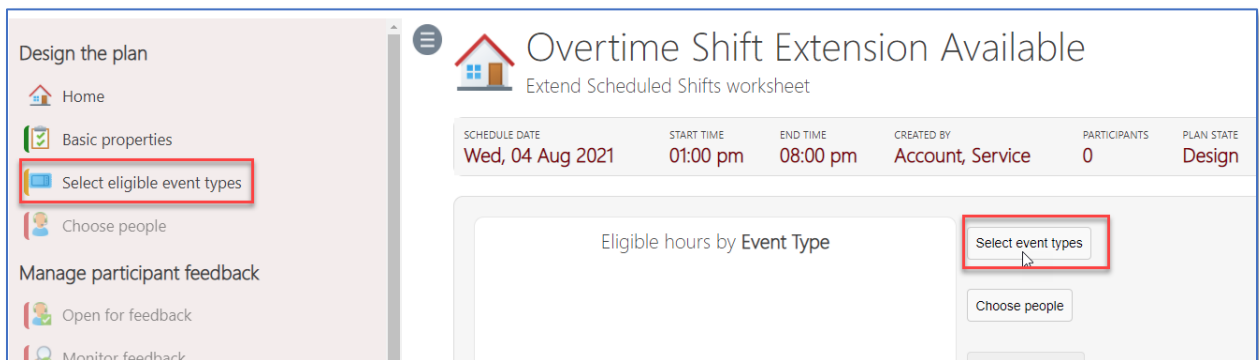
Do plan participants have to accept the plan?

Do you want to execute the plan immediately on acceptance?

Minimum participant count (blank means no minimum)

Minimum participant count (blank means no maximum)



14. Click *Save plan properties* to complete the configuration of the basic properties.
15. Upon saving, the *Select event types* window opens. Click *Select eligible event types* or *Select event types*.





16. Click *Select event types*.

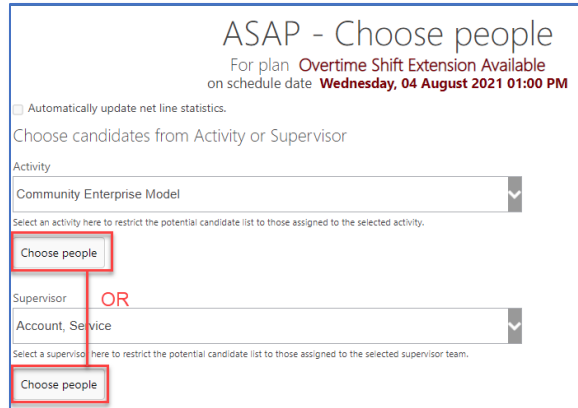
17. In the pop-up, select the event types you want to include (e.g., will you include someone who is already working an overtime shift?) then click *Save*.

Id	Select?	Event type name	Display color
5	<input checked="" type="checkbox"/>	Overtime	
1	<input checked="" type="checkbox"/>	Work	

18. Click *Choose people* then *Choose plan participants*. The system knows to present only the people who are scheduled during the specified shift.



19. Choose the candidates. Decide whether you want to filter for everyone in the enterprise model (or just an activity), or you can select a specific supervisor's team.



ASAP - Choose people
For plan **Overtime Shift Extension Available**
on schedule date **Wednesday, 04 August 2021 01:00 PM**

Automatically update net line statistics.

Choose candidates from Activity or Supervisor

Activity
Community Enterprise Model

Select an activity here to restrict the potential candidate list to those assigned to the selected activity.

Choose people

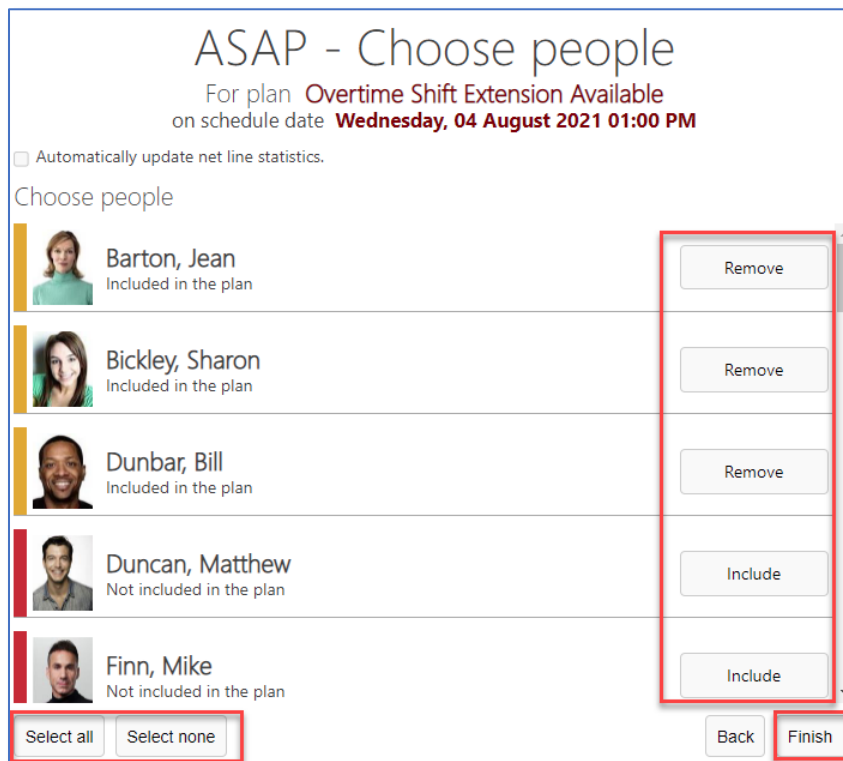
OR

Supervisor
Account, Service

Select a supervisor here to restrict the potential candidate list to those assigned to the selected supervisor team.

Choose people






20. Once you determine the filter, you can choose to include all agents or just include a few. Click *Select all* or *Select none* and then refine your selection with *Remove* or *Include* next to each agent. For example: if there is someone with a medical issue who cannot work overtime or come in early, you would exclude them from the plan. Those not selected have a red border. If you require agent acceptance before executing the plan, agents will have a yellow border. Make your selections then click *Finish*.



ASAP - Choose people
For plan **Overtime Shift Extension Available**
on schedule date **Wednesday, 04 August 2021 01:00 PM**

Automatically update net line statistics.

Choose people

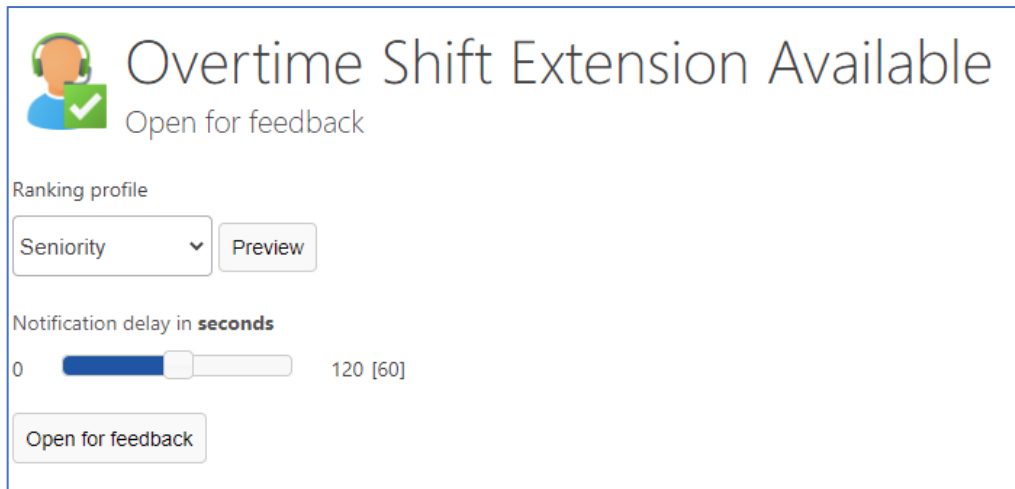
	Barton, Jean Included in the plan	Remove
	Bickley, Sharon Included in the plan	Remove
	Dunbar, Bill Included in the plan	Remove
	Duncan, Matthew Not included in the plan	Include
	Finn, Mike Not included in the plan	Include

Select all Select none Back Finish



21. After selecting the agents, you must decide whether the ASAP will be distributed to everyone at the same time, or will some agents receive the notification first based on your previously defined ranking profile (seniority or performance ranking, etc.). You can preview or change the ranking profile here.

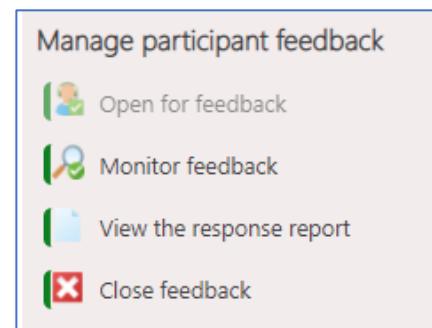
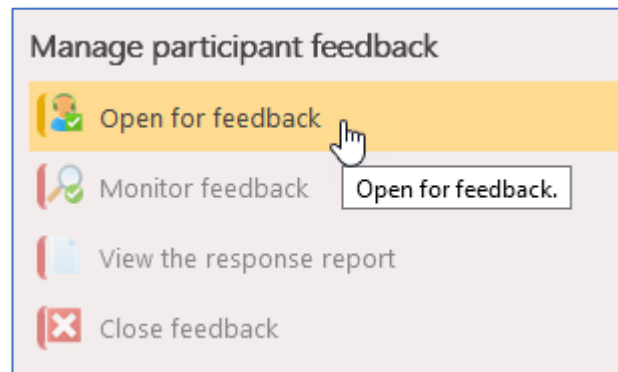
Notification delay: You can choose how long each agent will have before the ASAP is presented to the next agent when you use a ranking profile. If you have lots of eligible agents, consider keeping the notification delay to a very short time or agents might be receiving notifications two days later! The delay slider is in seconds (not minutes).



21. Click *Open for feedback* to distribute the ASAP to the agents.

You can follow the rates of acceptance on the *Monitor feedback* dashboard or select *View the response report* to view individual agent responses.

If you indicated a maximum number of agents who can accept the plan, the plan will stop approving new agents as soon as that number is reached. Any additional agents who try to accept the plan will receive a message that the maximum has been reached and it is no longer available, e.g., *Thank you for accepting the proposed schedule adjustment program on 11 Aug 2021.*





However, the maximum number of respondents has been reached, so you will not be included in this plan's execution.

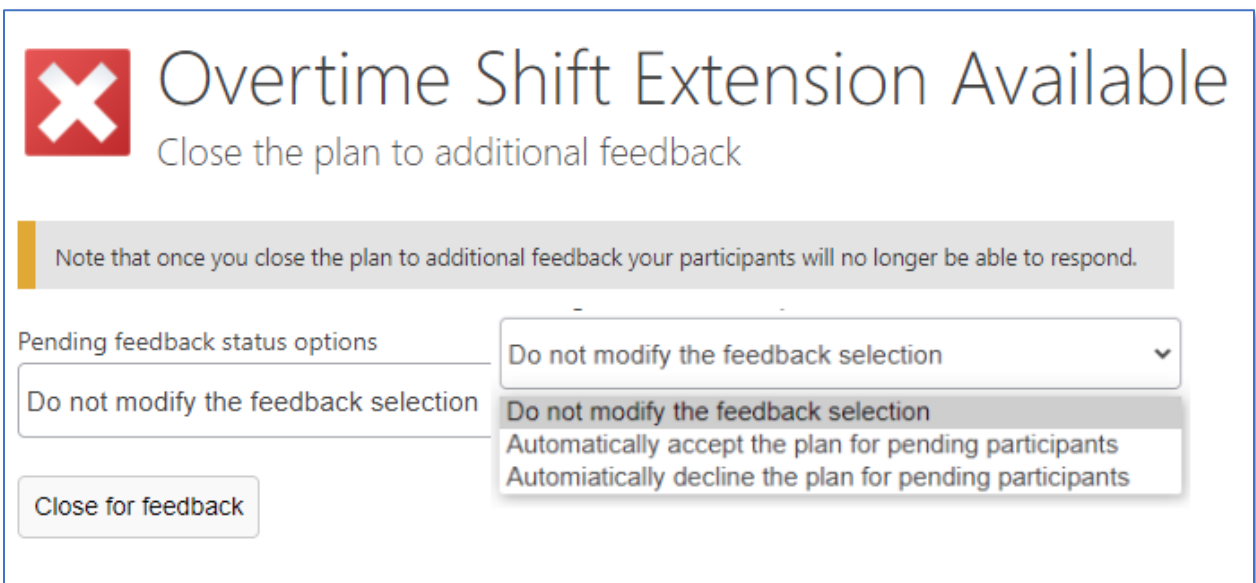
If you did not select a maximum number, or decide to close the plan to close the plan early, select *Close feedback*.

22. When you are ready to *Close feedback*, indicate what the ASAP should do for any pending feedback (the agent has not replied), then click *Close for Feedback*.

Do not modify the feedback selection will not make any changes to the agent's schedule.

Automatically accept the plan for pending participants will accept the plan. **Note:** if you select this option, it will override any quotas. E.g., if you set a maximum of 3 participants, 3 accepted, and there are 4 pending, it will include all who accepted plus the 4 pending.

Automatically decline the plan for pending participants will decline the plan.



Overtime Shift Extension Available
Close the plan to additional feedback

Note that once you close the plan to additional feedback your participants will no longer be able to respond.

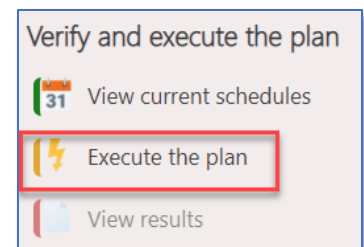
Pending feedback status options

Do not modify the feedback selection


Close for feedback


Do not modify the feedback selection
Automatically accept the plan for pending participants
Automatically decline the plan for pending participants


23. Execute the plan after you have received all feedback. **Note:** If you selected the option to execute the plan upon acceptance, you will not need to do this step.



Verify and execute the plan

 31 View current schedules

 Execute the plan

 View results

Note: Once executed, you *cannot* undo the action. For example, if you add 30 minutes to agents' end times, you cannot remove that time by deleting the ASAP.

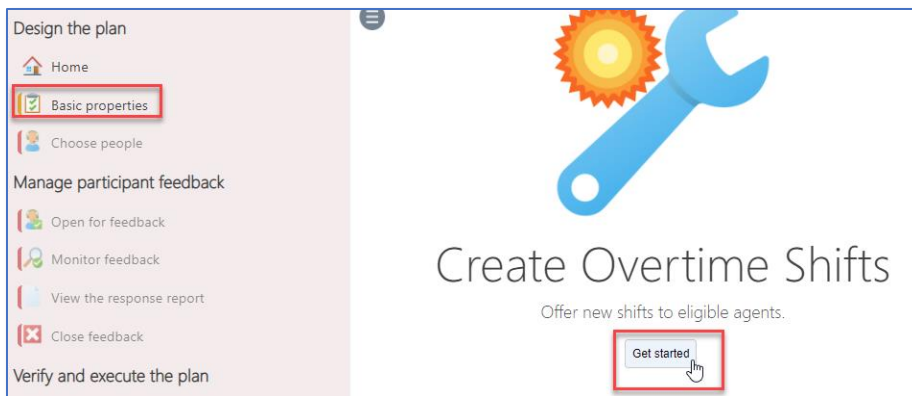


Create Overtime Shifts

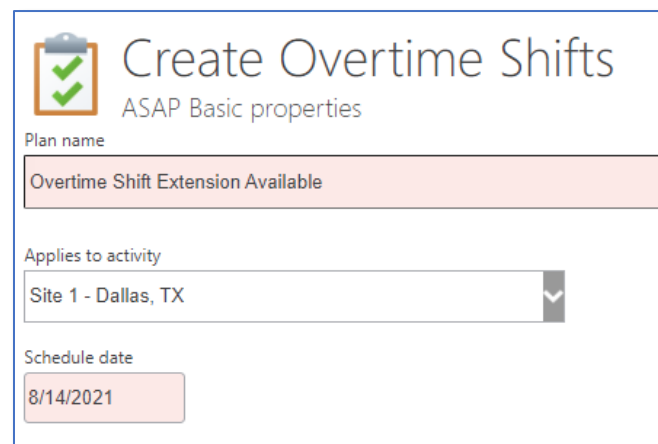
Create overtime shifts is similar to extend scheduled shifts but allows inclusion of agents who are not working that day or do not have a schedule during the ASAP time offering and creates an entirely new work assignment. Create overtime shifts also allows for agents' acceptance and minimum/maximum participants. For example: Offer a 4-hour shift to agents with Spanish skill who are not working today, but no more than 5 total agents can accept. If you are offering overtime for multiple shifts, you must create multiple ASAPs.

Navigate to ASAP Create Overtime Shifts using one of the [three methods described](#).

1. Click *Get Started* or *Basic properties* (you can't click on any other step until you have completed this).



2. Give the plan a name. (Consider not including "overtime" in the plan name if there are agents who won't accrue overtime pay if they accept the plan).
3. **Applies to Activity:** Use to include schedules that have a specific activity assigned.
3. **Schedule date:** The date auto-populates with the day in the schedule you were on when you launched the ASAP (but you can change the date here if you need to).





- Eligible shift boundary earliest / latest:** Identify the window of time for the plan to create the overtime shifts. Edit both *Start time* and *End time*.

Eligible shift boundary earliest

1 : 00 : PM

Eligible shift boundary latest

6 : 00 : PM

- Restrict to agents compatible with the selected agent template allows customization of the plan. If the plan will apply to everyone leave this as -- No Selection--.
- Allow agents with schedules on this date to participate in this plan?** Do you want to allow agents who are already working to add additional time? If you are adding a 12-hour shift, you might choose to exclude those who are already scheduled to work for 8 hours.

Allow agents with schedules on this date to participate in this plan?

Yes, allow scheduled agents to participate. ▾

Yes, allow scheduled agents to participate.

No, exclude agents that are already scheduled on the specified date.

- Event type:** Select how the plan should identify this event:

Event type

Overtime	<input type="checkbox"/>
E-mail Work	<input type="checkbox"/>
Overtime	<input checked="" type="checkbox"/>
Work	<input type="checkbox"/>



- Overtime off-phone options**—Break sets: If required, indicate if the plan should include breaks within the overtime event. Select a break set type from the drop-down. The plan will automatically optimize any included breaks when the plan is executed.

Overtime off-phone options

Specify a breakset for longer overtime intervals?

Yes ▾

Break set used for off-phone time

10:15 brk ▾

10:15 brk
 12pm lunch
 3:30 brk
4hr shift with 15 min break
 6 HR - 15 min BRK
 8.5 Hour Shift
 9 Hour Shift
 Break only

4hr shift with 15 min break ▾

Participant acceptance settings

- Do plan participants have to accept the plan?**

If No, participants are automatically included in the plan, it will execute the change without agent approval. Think of it as a “voluntold” rather than “volunteer.”

Participant acceptance settings

Do plan participants have to accept the plan?

No, participants are automatically included in the plan. ▾

No, participants are automatically included in the plan.
 Yes, participants must accept the plan prior to execution.

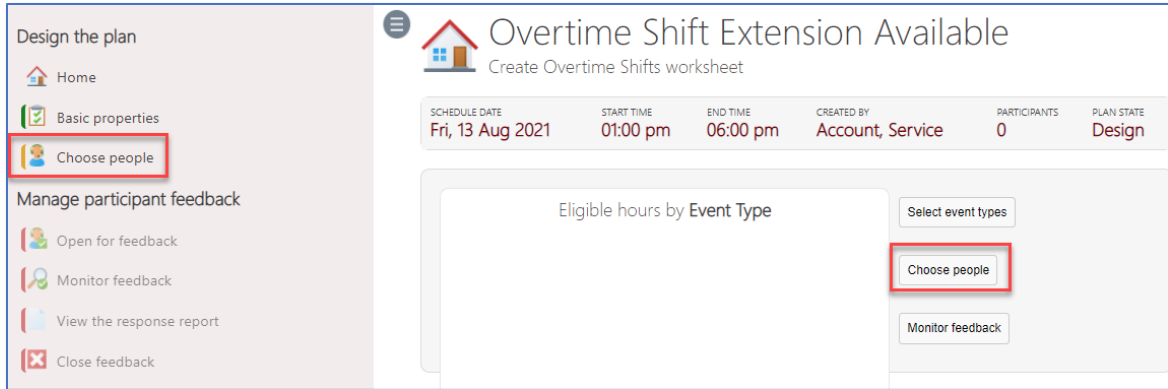
If Yes, participants must accept the plan prior to execution, agents must accept the change before it can be executed.

If Yes, you will see additional options to indicate whether to execute the change immediately (this allows you to automate the execution of the plan), and whether there should be a minimum and/or maximum total number of participants for this plan. **Note:** If checking the box to immediately execute the schedule change, you cannot specify a minimum number of participants (but you can still have a maximum).

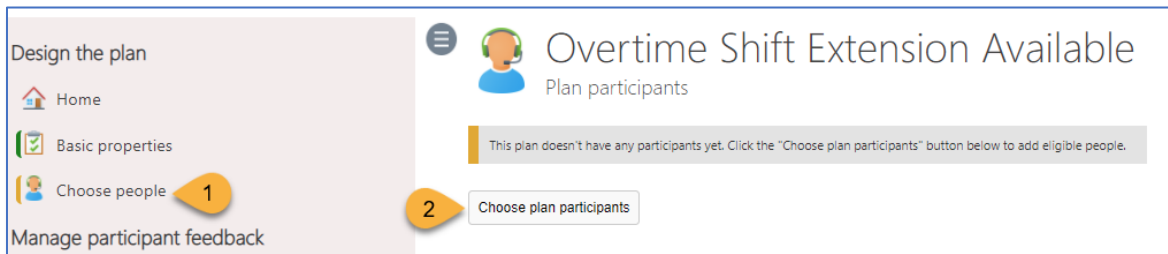
- Click *Save* to complete the configuration of the basic properties.



- Click *Choose people* from either location then *Choose plan participants*. The system knows to present only the people who are not scheduled on the day or during the specified time.

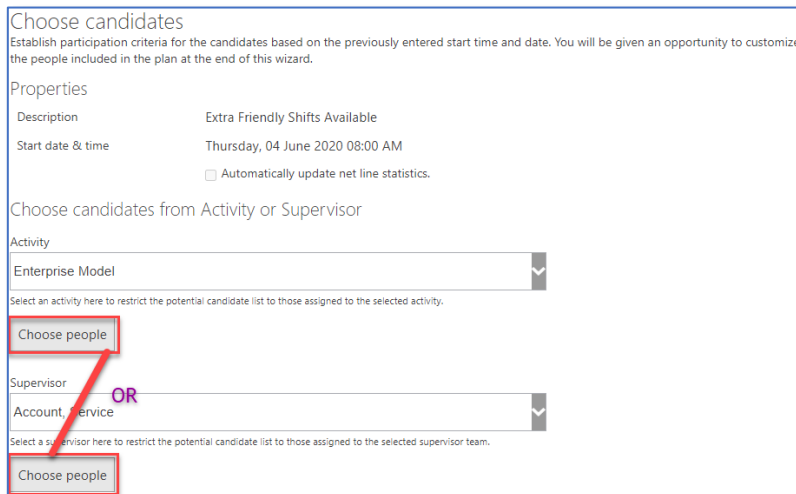


The screenshot shows the 'Design the plan' interface for 'Overtime Shift Extension Available'. The left sidebar has a 'Choose people' button highlighted with a red box. The main content area shows a table with columns: SCHEDULE DATE (Fri, 13 Aug 2021), START TIME (01:00 pm), END TIME (06:00 pm), CREATED BY (Account, Service), PARTICIPANTS (0), and PLAN STATE (Design). Below the table, there is a section titled 'Eligible hours by Event Type' with a 'Choose people' button highlighted in red.



The screenshot shows the 'Overtime Shift Extension Available' interface with the 'Plan participants' section. The left sidebar has a 'Choose people' button with a yellow callout '1'. The main content area has a message: 'This plan doesn't have any participants yet. Click the "Choose plan participants" button below to add eligible people.' A 'Choose plan participants' button is highlighted with a yellow callout '2'.

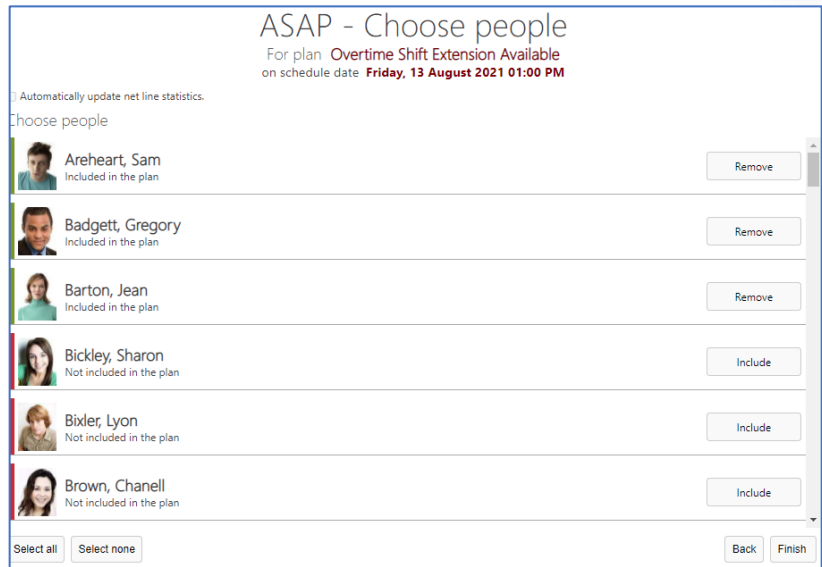
- Choose the candidates. Decide whether you want to filter for everyone in the enterprise model (or just an activity), or you can select a specific supervisor's team.



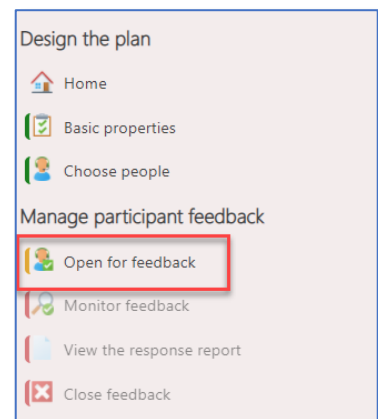
The screenshot shows the 'Choose candidates' dialog box. It includes a description: 'Establish participation criteria for the candidates based on the previously entered start time and date. You will be given an opportunity to customize the people included in the plan at the end of this wizard.' Under 'Properties', the description is 'Extra Friendly Shifts Available' and the start date is 'Thursday, 04 June 2020 08:00 AM'. There is a checkbox for 'Automatically update net line statistics'. The 'Choose candidates from Activity or Supervisor' section has two dropdown menus: 'Activity' (set to 'Enterprise Model') and 'Supervisor' (set to 'Account, Service'). Both dropdown menus have a 'Choose people' button below them, which are highlighted with red boxes. A red arrow points from the 'Choose people' button under 'Activity' to the 'Choose people' button under 'Supervisor', with the word 'OR' in purple between them.



13. Once you determine the filter, you can choose to include all agents or just include a few. Click *Select all* or *Select none* and then refine your selection with *Remove* or *Include* next to each agent. For example: if there is someone with a medical issue who cannot work overtime or come in early, you would exclude them from the plan. Make your selections then click *Finish*.

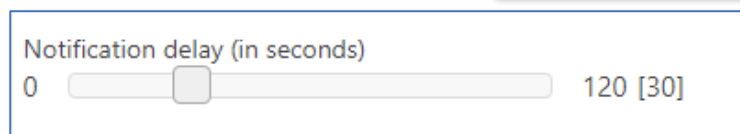
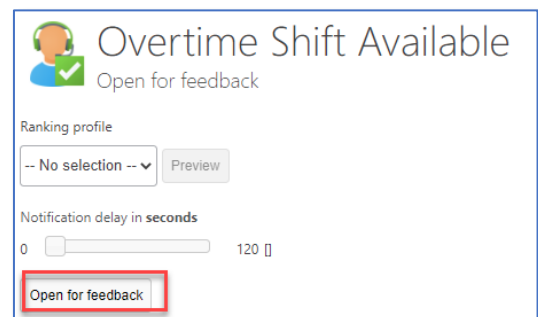


14. Open for Feedback: After selecting the agents, you must decide whether the plan will be distributed to everyone at once, or will some agents receive the notification first based on your previously defined ranking profile (seniority or performance ranking).



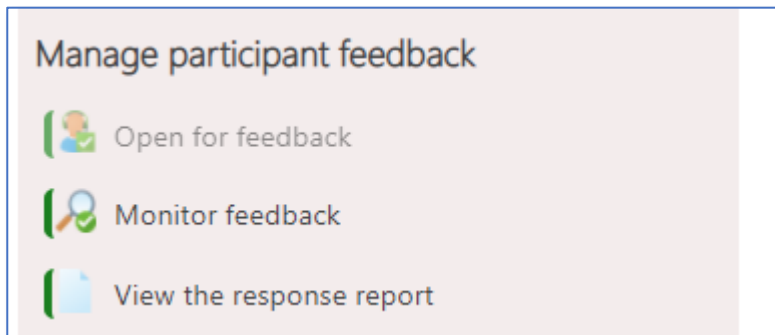
You can choose how long each agent will have before the plan is presented to the next agent.

If you have lots of eligible agents, consider keeping the notification delay to a very short time or agents might be receiving notification 2 days later! The delay slider is in seconds (not minutes).



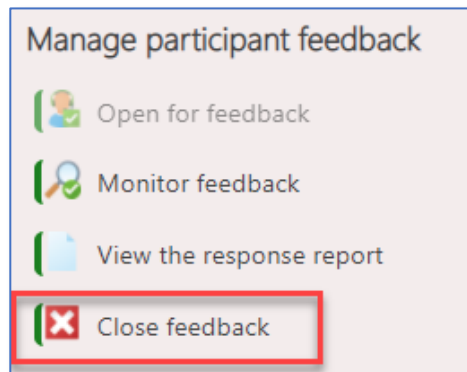


- You can follow the rates of acceptance on the dashboard, or select *View the response report* to view the response of an individual agent.



- If you indicated a maximum number of agents who can accept the plan, the plan will stop approving new agents as soon as that number is reached. Any additional agents who try to accept the plan will receive a message that the maximum has been reached and it is no longer available, e.g., *Thank you for accepting the proposed schedule adjustment program on 11 Aug 2021. However, the maximum number of respondents has been reached, so you will not be included in this plan's execution.*

If you did not select a maximum number, or are ready to close the plan, select *Close feedback*.



- If you did not select a maximum number, indicate what the plan should do for pending feedback (the agent has not replied), then click *Close feedback*.

Do not modify the feedback selection will not make any changes to the agent’s schedule. **Automatically accept the plan for pending participants** will accept the plan.

Warning: if you select this option, it will override any quotas. E.g., if you set a maximum of 3 participants, 3 accepted, and there are 4 pending, it will include all who accepted plus the 4 pending.

Automatically decline the plan for pending participants will decline the plan.



Overtime Shift Available

Close the plan to additional feedback

Note that once you close the plan to additional feedback your participants will no longer be able to respond.

Pending feedback status options

Do not modify the feedback selection

- Do not modify the feedback selection
- Automatically accept the plan for pending participants
- Automatically decline the plan for pending participants

18. Execute the plan after you have received all feedback. If you selected the option to execute the plan upon agent acceptance, you will not need to do this step.

Overtime Shift Available

Close the plan to additional feedback

Note that once you close the plan to additional feedback your participants will no longer be able to respond.

Pending feedback status options

Do not modify the feedback selection

Close for feedback

Note: *Once executed, you cannot undo the action.* For example, if you create shifts for a dozen agents, you cannot remove the shifts by deleting the ASAP.



Decrease Available Staff

Plan a Meeting

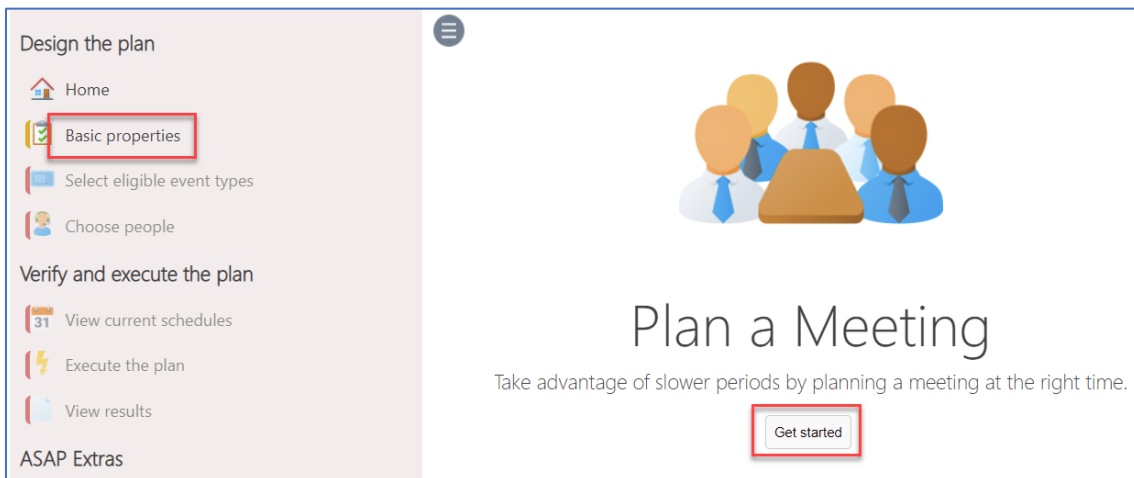
This is a two-way meeting planner for either finding the best time for a meeting for a group of specific agents, or finding agents to fill a specific meeting time.

Here are two examples:

1. You have 10 agents and need to find a 30-minute meeting time when all can attend. This ASAP will allow you to select what work or events may be included in the search for a time, what time and date ranges to use, and will present you with options. Once executed, it will schedule the meeting and notify the agents.
2. HR is requesting that you send 10 agents to a meeting from 1:00 pm to 2:00 pm on Wednesday. This ASAP will allow you select which types of work agents may be pulled away from and will show you who is available during that time. Once executed, it will schedule the meeting and notify the agents.

Navigate to ASAP Plan a Meeting using one of the three methods [described above](#).

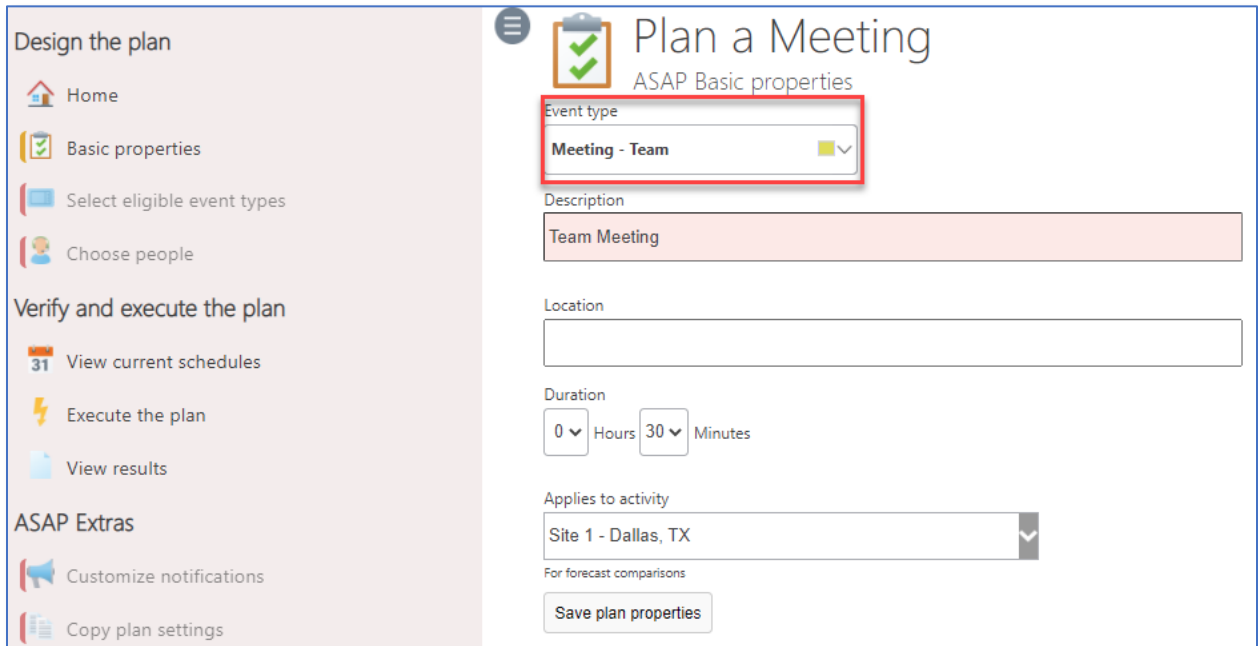
1. Click *Get Started* or *Basic properties* (you can't click on any other step until you have completed this).



2. **Event type:** Select the meeting/coaching event type and give your meeting a name.



3. **Location:** You can specify the meeting location (if known).
4. **Duration:** Enter the planned duration of the meeting/coaching event.
5. **Applies to activity:** Select the group who will participate in the meeting. You can choose the whole enterprise model, or you can include only one folder or activity from the enterprise model.
6. Click *Save plan properties*.



Plan a Meeting
ASAP Basic properties

Event type
Meeting - Team

Description
Team Meeting

Location

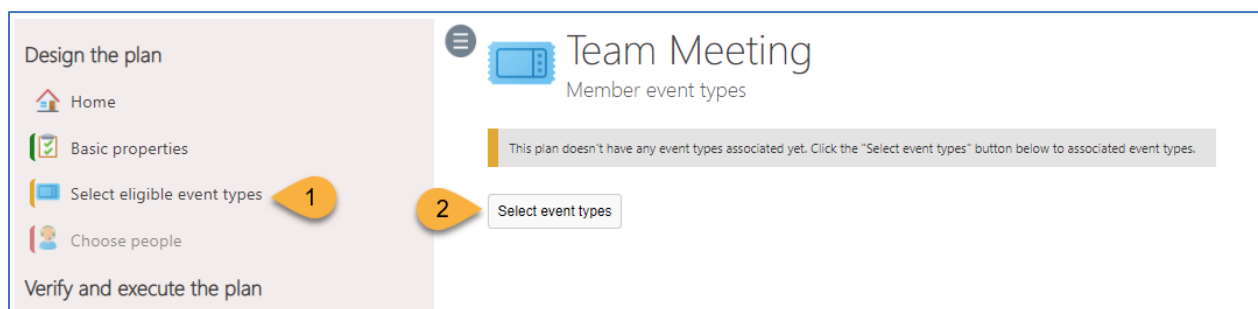
Duration
0 Hours 30 Minutes

Applies to activity
Site 1 - Dallas, TX

For forecast comparisons

Save plan properties

7. Select eligible event types then click *Select event types*



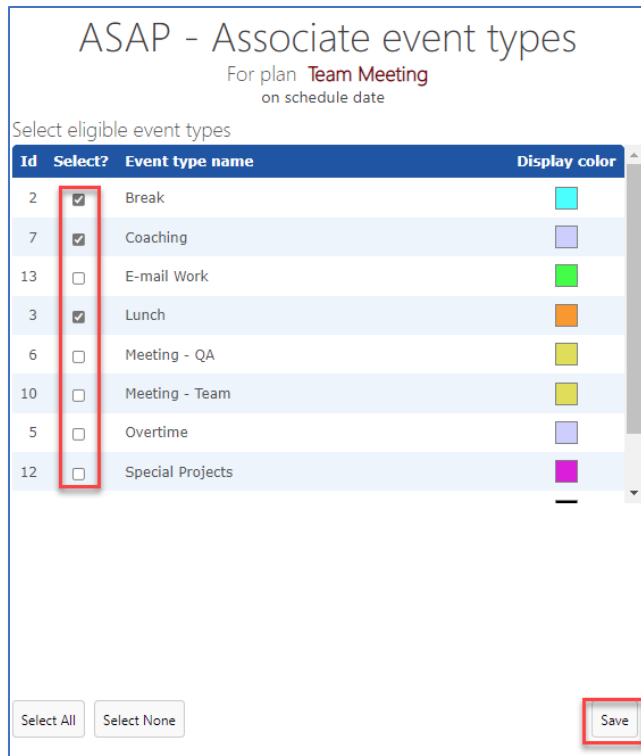
Team Meeting
Member event types

This plan doesn't have any event types associated yet. Click the "Select event types" button below to associated event types.

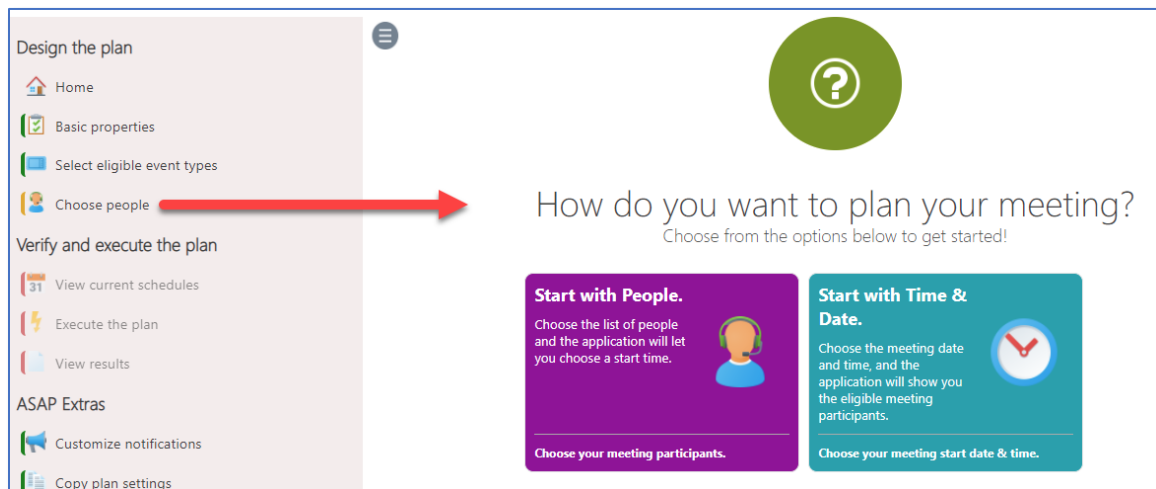
Select event types



- Select all event types that the plan should look for in agents' schedules. For example, should you include an agent who has a lunch or break during the meeting time?



- Click *Choose people* to launch *How do you want to plan your meeting?* where you select whether to *Start with People* or *Start with Time and Date*. Choose people and have the plan find the best time, or choose the start date and time and let the plan find people who can attend.



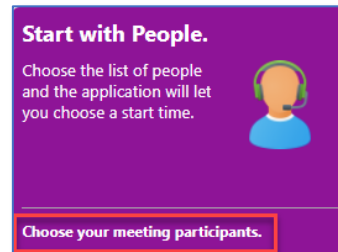


Start with People

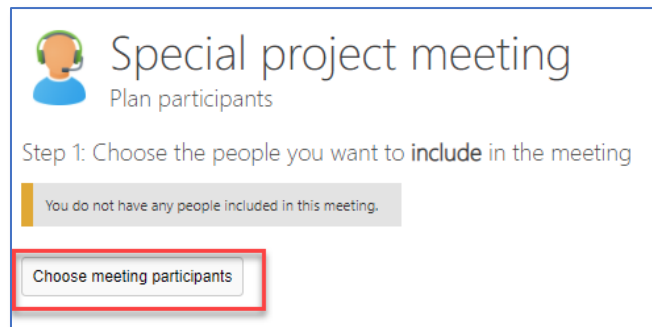
Skip ahead to [Start with Time and Date](#)

Go back to [Start with People](#).

10. Click *Choose your meeting participants*.

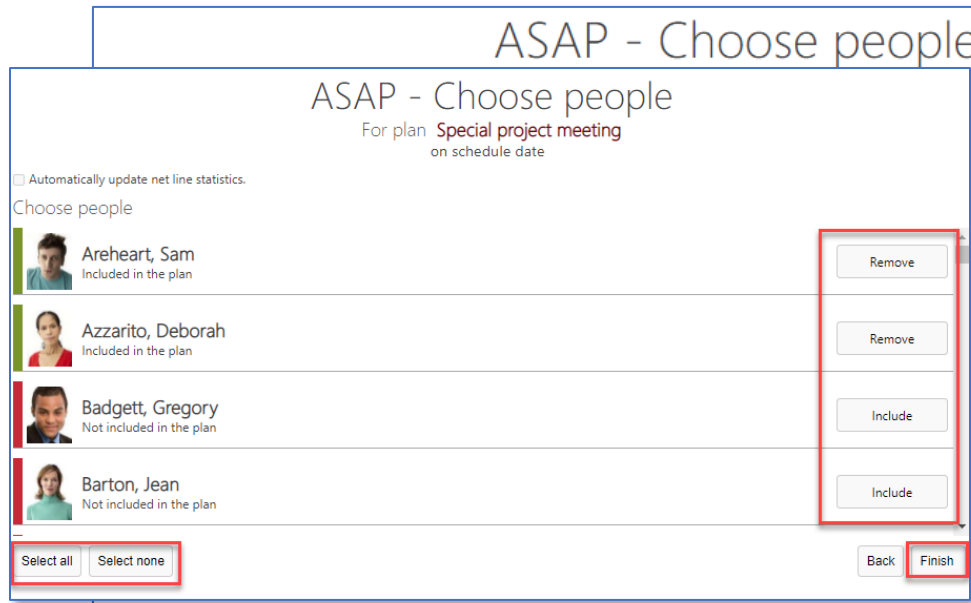


11. Click *Choose meeting participants*.





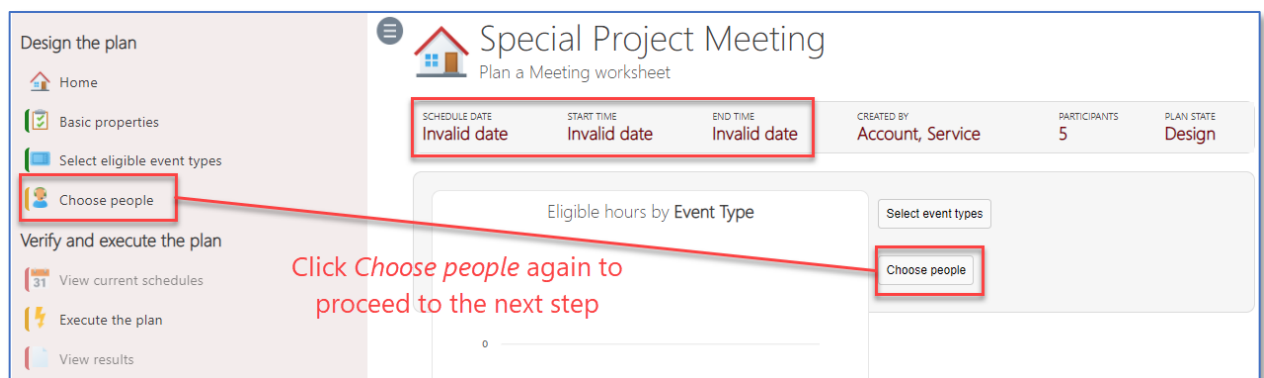
12. Decide whether you want to filter for everyone in the enterprise model (or just an activity), or you can select a specific supervisor's team. Select an Activity or Supervisor group.
13. Once you determine the filter, you can choose to include all agents or just include a few.



Click *Select all* or *Select none* and then refine your selection with *Remove* or *Include* next to each agent. Make your selections then click *Finish*.

Note: The next screen will show *Invalid date* and *Invalid times*.

To proceed to the next step, click *Choose people* again to launch the planning page.





- Step 2: Select start date & time:** Click *Generate start times* and the plan will find the best meeting date and time for this group.

Special project meeting
Plan participants

Step 1: Choose the people you want to **include** in the meeting

Areheart, Sam | Azarito, Deborah | Badgett, Gregory | Barton, Jean

Select meeting participants

You chose plan participants from the **Activity** named **Site 1 - Dallas, TX**. If you want to change this setting, click the "Update candidate list" button below.

Note that modifying the candidate list will remove all people already selected.

Update candidate list

Step 2: Select start date & time

You have not yet generated candidate start times. Please generate the list of candidate start times and select the preferred start time from that list.

Generate start times | Select a start time

- First select acceptable dates from the list of eligible options. You can go forward or backward by one week to search for additional dates. After making your selections click *Next*.

ASAP - Generate candidate start times
For plan **Special project meeting**
Event type **Special Projects** with duration **1 Hours, 0 Minutes**

Populate the list of available start times given the parameters provided in this wizard. You will have the opportunity to choose the actual meeting start time from the list of candidate start times.

Eligible schedule dates	Selected schedule dates
<input checked="" type="checkbox"/> Tuesday, 10 August 2021	Tuesday, 10 Aug 2021
<input checked="" type="checkbox"/> Wednesday, 11 August 2021	Wednesday, 11 Aug 2021
<input checked="" type="checkbox"/> Thursday, 12 August 2021	Thursday, 12 Aug 2021
<input type="checkbox"/> Friday, 13 August 2021	Tuesday, 17 Aug 2021
<input type="checkbox"/> Saturday, 14 August 2021	Wednesday, 18 Aug 2021
<input type="checkbox"/> Sunday, 15 August 2021	
<input type="checkbox"/> Monday, 16 August 2021	

All | None | Backward one week | Forward one week

Next | Cancel



16. If you want to designate a specific time range for the meeting, uncheck the box *Consider any overlapping scheduled time...* and click *New* to create a new time window.

Eligible start time ranges

Consider any overlapping scheduled time in eligible events for identified participants as a valid start time.
Alternatively, you may constrain the list of eligible start times to overlapping scheduled time in eligible events that fall inside one or more specified start time ranges.

You do not have any valid start time ranges defined.

Id	Start Time	End Time
New	Configure eligible start time	

Select the earliest start and latest start from the times below. Note that latest start time must be after earliest start time.

Earliest start time
 : AM

Latest start time
 : AM

17. On the next screen, click *Generate Start Times*.

Generate Candidate Start Times

Populate the list of available start times given the parameters provided in this wizard. You will have the opportunity to choose the actual meeting start time from the list of candidate start times.

Properties

Type	Coaching
Description	Planned Friendly Meeting
Duration	1 Hours, 0 Minutes

Candidate start times

The list of candidate start times is sorted (by default) by the Total Error value. The Total Error value represents the combined error score considering both the schedule error value and the participant error value.

No candidate start times are currently present.

Generate Start Times

18. The plan will generate a list of possible dates and times, ranked by the best possible options at the top. The *Participant Error* column will display participant factors – can everyone attend the meeting, or does it break any of the schedule rules? If zero, all people are available. The *Schedule Error* column shows the possible impact to your schedule. **Note:** Don't focus on the number – it's just a factor within the system. For example, if the schedule error is 6, it does not mean you will be 6 people short at that time.



19. If you prefer to select a different date/time, make the selection in the far-right column by clicking the edit icon, then confirming that you want to change. Your selection will move to the top of the list and have a green check. Once you make a final selection click *Finish*.

CommunityWFM test5schedules.wfmsg.com says

Are you sure you wish to use this as the preferred start time?

OK Cancel

Event type **Special Projects** with duration **1 Hours, 0 Minutes**

Populate the list of available start times given the parameters provided in this wizard. You will have the opportunity to choose the actual meeting start time from the list of candidate start times.

Candidate start times

The list of candidate start times is sorted (by default) by the Total Error value. The Total Error value represents the combined error score considering both the schedule error value and the participant error value.

Id	Start Time	Participant Error	Schedule Error	Total Error	Is Selected?
3859	Tuesday, 10 August 2021 03:15 PM	1	7	8	✓
3834	Tuesday, 10 August 2021 03:00 PM	0	7	7	
3797	Tuesday, 10 August 2021 02:45 PM	1	7	8	
3614	Tuesday, 10 August 2021 02:30 PM	2	7	9	

20. Prior to executing you can *View current schedules* to preview the effect of the ASAP.

Verify and execute the plan

- 31 View current schedules
- Execute the plan
- View results

The list of all agents and their schedules gives you the opportunity to see how executing the ASAP will affect the schedules.

Icons next to the agent names indicate if the agent is included/accepted (green check), response pending (question mark), declined (red X), excluded (red circle), or eligible but not included (yellow triangle).

Burns, Barbara
10 Apr 2017

Accepted

Carabo, Randy

- Bickley, Sharon
10 Jul 2017
- Bixler, Lyon
15 May 2017
- Burns, Barbara
10 Apr 2017
- Carabo, Randy
13 Mar 2017
- Dolinger, Joel
14 Nov 2016



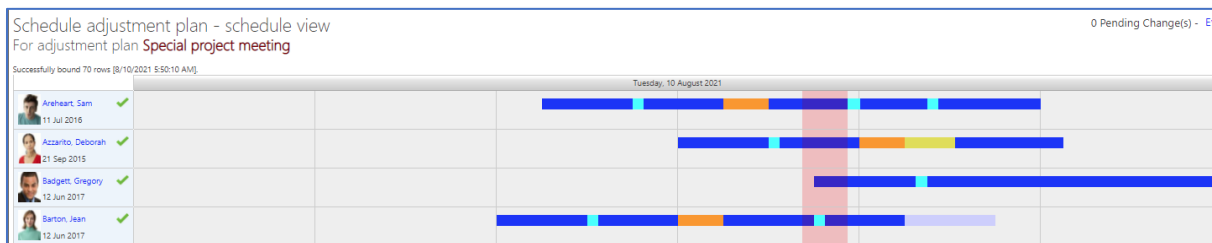
Bixler, Lyon
15 May 2017
Declined

Blakely, Latrice
01 Dec 2014
Brown, Chanell
This agent is not eligible for the adjustment plan.

Finn, Mike
29 Jul 2013
The agent is eligible for the plan but is not identified as a participant.

Bickley, Sharon
10 Jul 2017
Pending

The pink shaded area in the schedule indicates the ASAP timeframe.



21. Click *Execute the plan* then *Execute the plan* again.

Design the plan

- Home
- Basic properties
- Select eligible event types
- Choose people

Verify and execute the plan

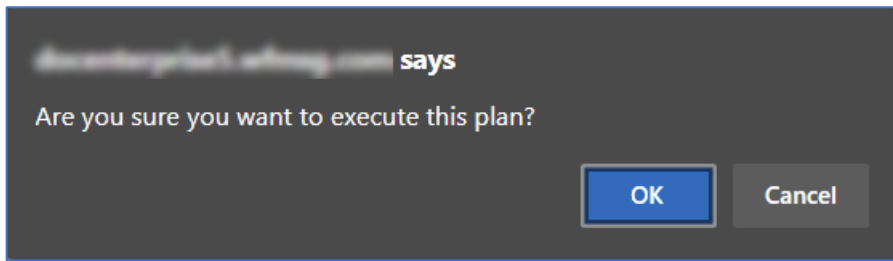
- View current schedules
- Execute the plan (1)

Special project meeting
Execute the plan (2)

Note that once you execute the plan the schedule changes must be manually modified if you change your mind.



22. Confirm that you want to execute the plan.



23. When you execute the plan, it will send a notification to the agents and place the meeting on their schedules.

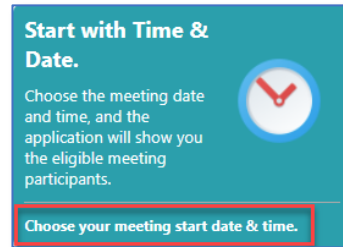
Note: *Once executed, you cannot undo the action.* For example, if you delete the meeting ASAP, it does not remove the meeting from the agent schedules.



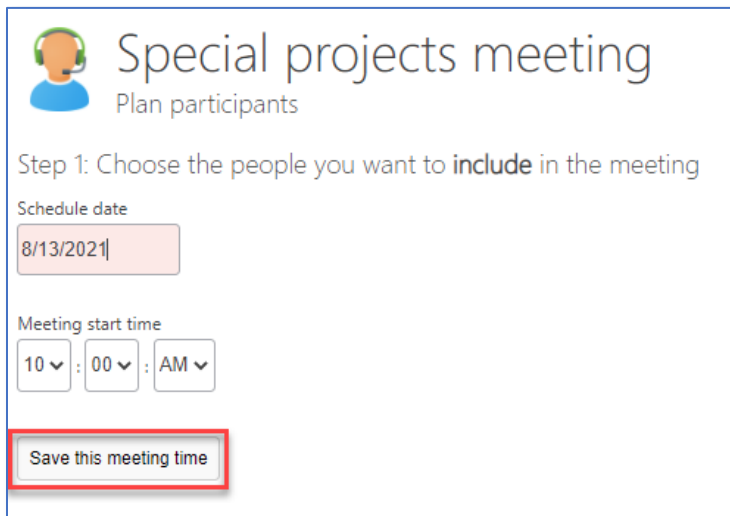
Start with Time and Date

Go back to [Start with People](#)

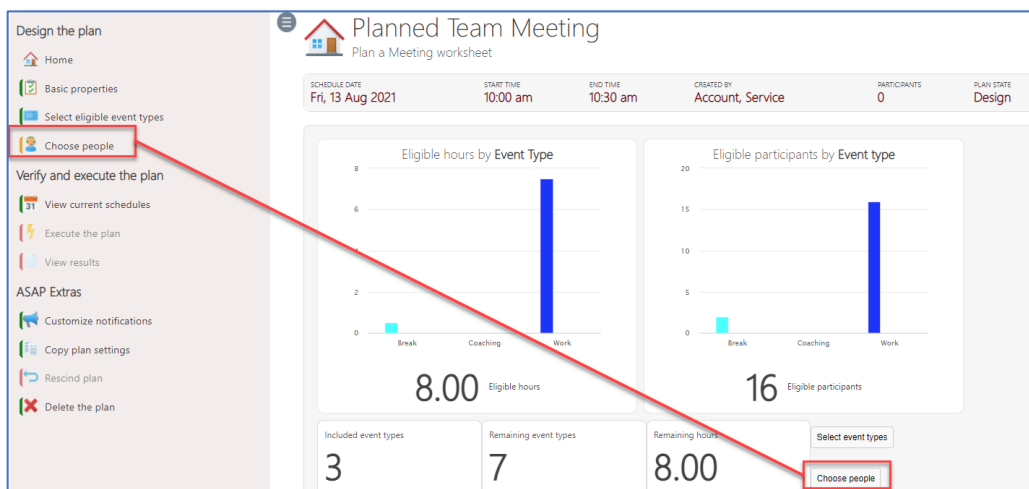
10. Click *Choose your meeting start date & time.*



11. Select the date and time for your meeting then click *Save this meeting time.*




12. Select *Choose people* from either location to launch the Plan participants selection window.





13. **Step 2:** There are two options to select your candidates: Selecting *Generate candidate list* will display all agents who are available at that date and time, or *Select candidates* to choose from a list.




Planned Meeting

Plan participants

Step 1: Choose the meeting **schedule date and start time**, and the application will find any eligible participants.

Schedule date

9/2/2021


Meeting start time

4

:

30

:

PM

Save this meeting time

Step 2: Choose the people you want to **include** in the meeting

Generate candidate list

Select candidates

Generate candidate list

Select the candidates who should attend the meeting then click *Finish*.

Select candidates

Select the candidates who should attend the meeting then click *Finish*.









You can review the schedules, add additional people, or revise eligible events.

ASAP - Choose people

For plan **Planned Team Meeting**
on schedule date **Friday, 13 August 2021 10:00 AM**

Automatically update net line statistics.

Choose people

	Badgett, Gregory <small>Included in the plan</small>	Remove
	Blakely, Latrice <small>Included in the plan</small>	Remove
	Dyer, Amanda <small>Included in the plan</small>	Remove
	Goldfarb, Brett <small>Included in the plan</small>	Remove
	Granda, Luis <small>Included in the plan</small>	Remove
	Greene, Tiffany <small>Not included in the plan</small>	Include
	Hunter, Satika <small>Not included in the plan</small>	Include
	Kinsella, Mark <small>Not included in the plan</small>	Include

Select all
Select none

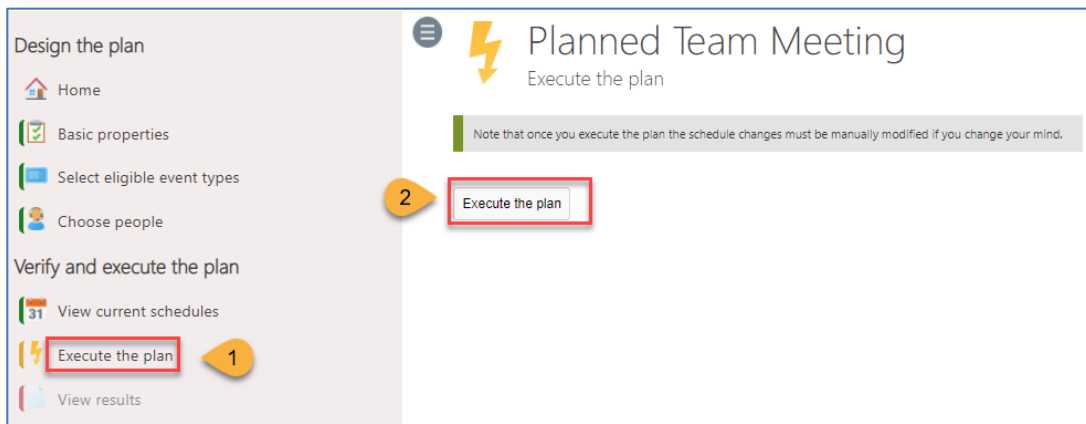
Back
Finish

	Baseline	Adjusted
Required hours	7.79	7.79
Staff hours	7.50	5.25
Variance	-0.29	-2.54

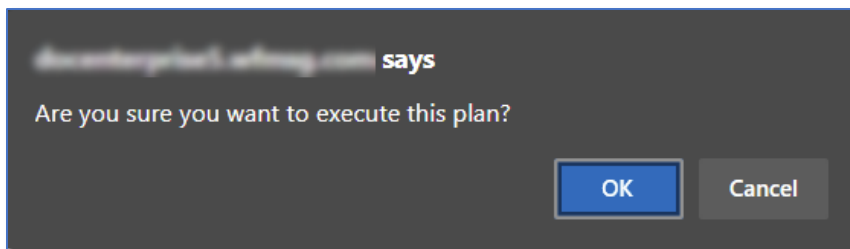
Currently viewing net-line statistics for activity **Site 1 - Dallas, TX**



14. When ready, select *Execute the plan* to schedule the meeting. Select *Execute the plan* again.



15. Confirm that you want to execute the plan to add the meeting to the agents' schedules.



Note: *Once executed, you cannot undo the action.* For example, if you schedule a meeting, you cannot remove it from the agent schedules by deleting the ASAP.

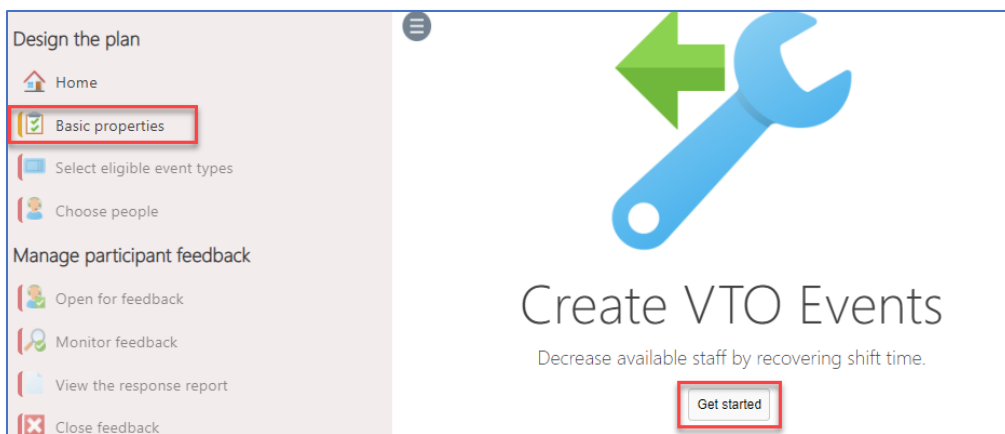


Create VTO Events

Creating voluntary time off events is the inverse of extending shifts. Create plans to reduce the duration of shifts, for example, by reducing all eligible agents by X minutes, or delaying start time for all eligible agents. VTO events allow for agent acceptance and minimum/maximum participants.

Navigate to ASAP Create VTO Events using one of the [three methods described](#).

1. Click *Get Started* or *Basic properties* (you can't click on any other step until you have completed this).



2. **Plan name:** Give your plan a name.
3. **Applies to activity:** Use to include schedules that have a specific activity assigned.
4. **Schedule date:** The date auto-populates with the day in the schedule you were on when you launched the ASAP (but you can change the date here if you need to).
5. Identify the window of time for the plan to offer the VTO. Edit both *Start time* and *End time*.



- Restrict to agents compatible with the selected agent template** allows customization of the plan. If the plan will apply to everyone leave this as -- No Selection--.
- How do you want to shrink the shift?** Should the plan create a new event to cover the VTO? Or shrink the shift by modifying the original event? If you shrink the shift by modifying the original event you will lose visibility of the VTO, which might be needed for reporting or for human resources accounting. If you create a new event, you can select the new event type.

How do you want to shrink the shift?

Shrink shifts by modifying the original event. ▼

Shrink shifts by modifying the original event.

Create new events of the selected type.

- Determine how the plan should present the VTO for agents leaving early, and for agents coming in late. Select the *Early departure behavior* and *Late arrival behavior*. As a general rule do not include both; create a new plan if you need to shorten the beginning **and** end of a shift. This will determine whether agents will leave work a specified amount of time before or after the shift (e.g., 2 hours — all shifts ending at 6:00 pm will now end at 4:00 pm; all shifts ending at 5:00 pm will now end at 3:00 pm), or if there will be a fixed time for all agents (all shifts end at to 4:00 pm).

Early departure behavior options:

Early departure behavior

Early departure behavior option

Specify a fixed end time for eligible participants ▼

Fixed early departure time

4 : 00 PM ▼

Early departure behavior

Early departure behavior option

Relative early departure time (in minutes) ▼

Relative start time (in minutes)

15 360 [120]

Late arrival behavior options:

Late arrival behavior

Late arrival behavior option

Relative late arrival time (in minutes) ▼

Relative start time (in minutes)

15 360 [120]



9. Do plan participants have to accept the plan?

If *No*, participants are automatically included in the plan, it will execute the change without agent approval. Think of it as a “voluntold” rather than “volunteer.”

If *Yes*, participants must accept the plan prior to execution, agents must accept the change before it can be executed.

If *Yes*, you will see additional options to indicate whether to execute the change immediately (this allows you to automate the execution of the plan), and whether there should be a minimum and/or maximum total number of participants for this plan. **Note:** If checking the box to immediately execute the schedule change, you cannot specify a minimum number of participants (but you can still have a maximum).

Participant acceptance settings

Do plan participants have to accept the plan?

No, participants are automatically included in the plan. ▼

No, participants are automatically included in the plan.

Yes, participants must accept the plan prior to execution.

[Save plan properties](#)

Participant acceptance settings

Do plan participants have to accept the plan?

Yes, participants must accept the plan prior to execution. ▼

Do you want to execute the plan immediately on acceptance?

No, execute the plan for all participants at the end of the feedback period. ▼

Minimum participant count (blank means no minimum)


Minimum participant count (blank means no maximum)

10. Click *Save plan properties* to complete the configuration of the basic properties.

11. Click *Select the eligible event types* or *Select event types* then *Select event types* again to select which events on an agent’s schedule may be offered VTO.

Design the plan

- [Home](#)
- [Basic properties](#)
- [Select eligible event types](#)
- [Choose people](#)
- Manage participant feedback
 - [Open for feedback](#)
 - [Monitor feedback](#)



Voluntary Time Off Available

Create VTO Events worksheet

SCHEDULE DATE	START TIME	END TIME	CREATED BY	PARTICIPANTS	PLAN STATE
Thu, 12 Aug 2021	12:00 pm	01:00 pm	Account, Service	0	Design

Eligible hours by Event Type

[Select event types](#)

[Choose people](#)

[Monitor feedback](#)



12. Select eligible event types then click *Save*.

ASAP - Associate event types

For plan **Voluntary Time Off Available**
on schedule date **Thursday, 12 August 2021 12:00 PM**

Select eligible event types

Id	Select?	Event type name	Display color
5	<input type="checkbox"/>	Overtime	
1	<input checked="" type="checkbox"/>	Work	

Select All Select None Save

13. Click *Choose people* from either location.

Design the plan

- Home
- Basic properties
- Select eligible event types
- Choose people
- Manage participant feedback
 - Open for feedback
 - Monitor feedback
 - View the response report

Voluntary Time Off Available
Create VTO Events worksheet

SCHEDULE DATE: **Thu, 12 Aug 2021** START TIME: **12:00 pm** END TIME: **01:00 pm** CREATED BY: **Account, Service** PARTICIPANTS: **0** PLAN STATE: **Design**

Eligible hours by Event Type

Select event types Choose people Monitor feedback

14. Choose the candidates. Decide whether you want to filter for everyone in the enterprise model (or just an activity), or you can select a specific supervisor's team.

ASAP - Choose people

For plan **Voluntary Time Off Available**
on schedule date **Saturday, 14 August 2021 07:30 AM**

Automatically update net line statistics.

Choose candidates from Activity or Supervisor

Activity
Community Enterprise Model

Select an activity here to restrict the potential candidate list to those assigned to the selected activity.

Choose people

Supervisor **OR**

Account, Service

Select a supervisor here to restrict the potential candidate list to those assigned to the selected supervisor team.

Choose people








15. Once you determine the filter, you can choose to include all agents or just include a few. Click *Select all* or *Select none* and then refine your selection with *Remove* or *Include* next to each agent. For example: if there is someone with transportation issues who cannot work overtime or come in early, you would exclude them from the plan. Make your selections then click *Finish*.

ASAP - Choose people

For plan **Voluntary Time Off Available**
on schedule date **Thursday, 12 August 2021 12:00 PM**

Automatically update net line statistics.

Choose people

	Azzarito, Deborah Included in the plan	<input type="button" value="Remove"/>
	Hipps, Casandra Included in the plan	<input type="button" value="Remove"/>
	Huntre, Laquista Included in the plan	<input type="button" value="Remove"/>
	Montes, David Not included in the plan	<input type="button" value="Include"/>
	Mosley, Kerry Not included in the plan	<input type="button" value="Include"/>

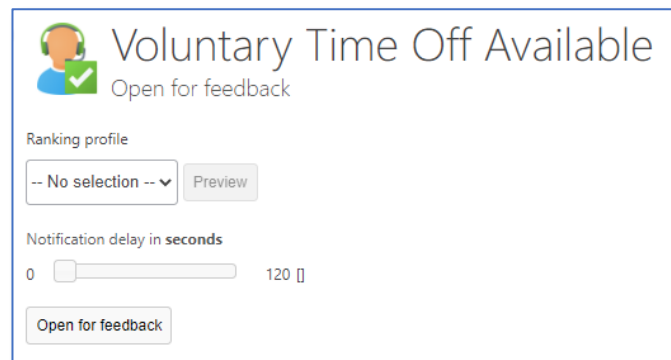
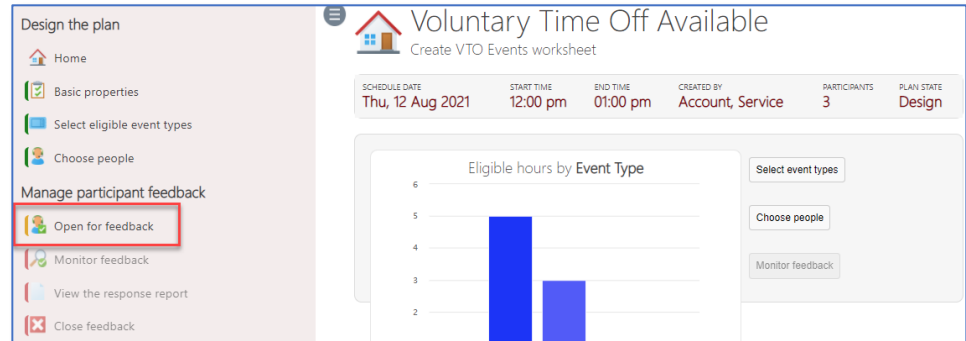
If you selected *...participants are automatically included in the plan*, you can proceed with executing the plan.

If you selected to allow participant acceptance—

16. **Open for Feedback:** After selecting the agents, you must decide whether the plan will be distributed to everyone at once, or will some agents receive the notification first based on your previously defined ranking profile (seniority or performance ranking).



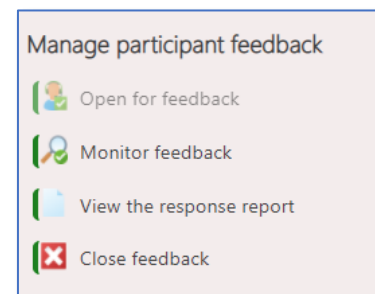
You can also choose how long each agent will have before the plan is presented to the next agent. If you have lots of eligible agents, consider keeping the notification delay to a very short time or agents might be receiving notification 2 days later! The delay slider is in seconds (not minutes).



You can follow the rates of acceptance on the dashboard via *Monitor feedback*, or select *View the response report* to view the response of an individual agent.

17. If you indicated a maximum number of agents who can accept the plan, the plan will stop approving new agents as soon as that number is reached. Any additional agents who try to accept the plan will receive a message that the maximum has been reached and it is no longer available, e.g., *Thank you for accepting the proposed schedule adjustment program on 11 Aug 2021. However, the maximum number of respondents has been reached, so you will not be included in this plan's execution.*

If you did not select a maximum number, or are ready to close the plan, indicate what the plan should do for pending feedback (the agent has not replied), then click *Close feedback*.



Do not modify the feedback selection will not make any changes to the agent’s schedule. **Automatically accept the plan for pending participants** will accept the plan. **Warning:** if you select this option, it will override any quotas. E.g., if you set a maximum of 3 participants, 3 accepted, and there are 4 pending, it will include all who accepted plus the 4 pending. **Automatically decline the plan for pending participants** will decline the plan.



Voluntary Time Off Available
Close the plan to additional feedback

Note that once you close the plan to additional feedback your participants will no longer be able to respond.

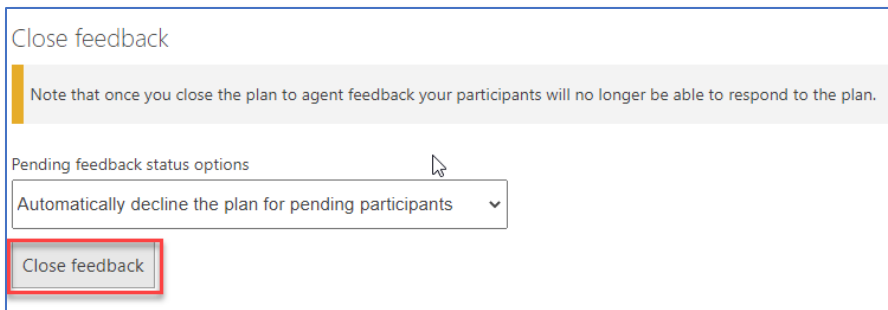
Pending feedback status options

Do not modify the feedback selection

Do not modify the feedback selection

Do not modify the feedback selection
Automatically accept the plan for pending participants
Automatically decline the plan for pending participants

Close for feedback



Close feedback

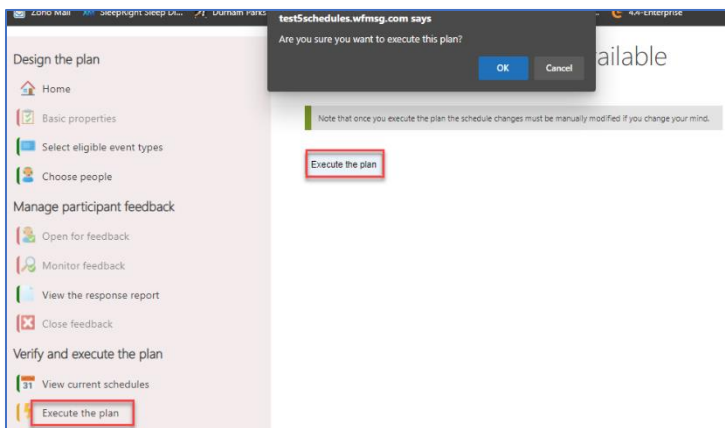
Note that once you close the plan to agent feedback your participants will no longer be able to respond to the plan.

Pending feedback status options

Automatically decline the plan for pending participants

Close feedback

Execute the plan after you have received all feedback. If you selected the option to execute the plan upon agent acceptance, you will not need to do this step but you still can.



test5schedules.wfmsg.com says

Are you sure you want to execute this plan?

OK Cancel

Note that once you execute the plan the schedule changes must be manually modified if you change your mind.

Execute the plan

Design the plan

- Home
- Basic properties
- Select eligible event types
- Choose people

Manage participant feedback

- Open for feedback
- Monitor feedback
- View the response report
- Close feedback

Verify and execute the plan

- View current schedules
- Execute the plan

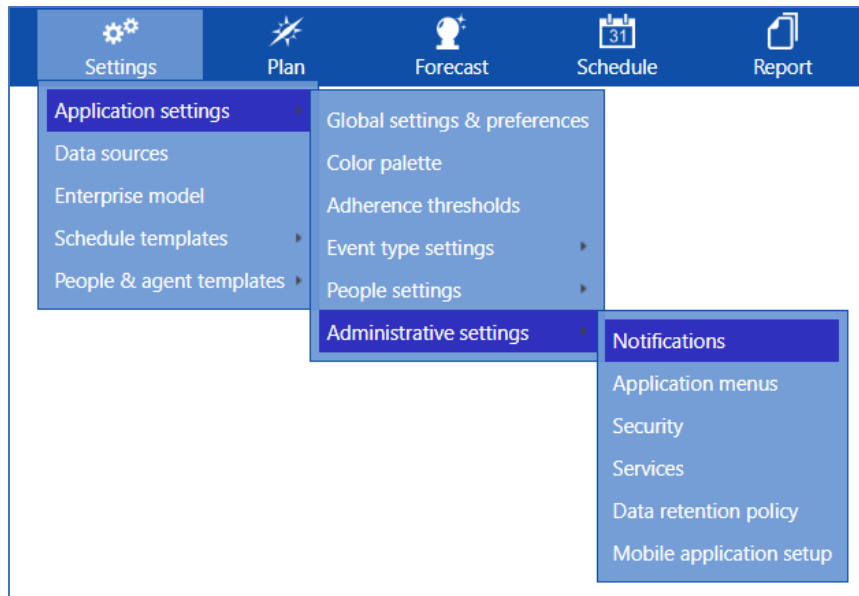
Note: Once executed, you *cannot* undo the action. For example, if you schedule agents to leave early, you cannot cancel it by deleting the ASAP.



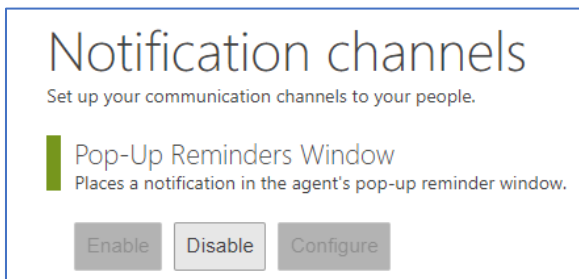
Customize Notifications

A communication mechanism must be in place for ASAPs (memos or pop-ups) so an agent can see that there is a change in their schedule, or so they can participate in a plan (e.g., accept overtime or VTO). Agents receive notifications in the memo field of their home page (if the agent has enabled memos), or through pop-up notifications (if that service is enabled on your system).

To determine if you have pop-ups enabled: Go to Setting > Application settings > Administrative settings > Notifications.



A green bar means that pop-ups are enabled.



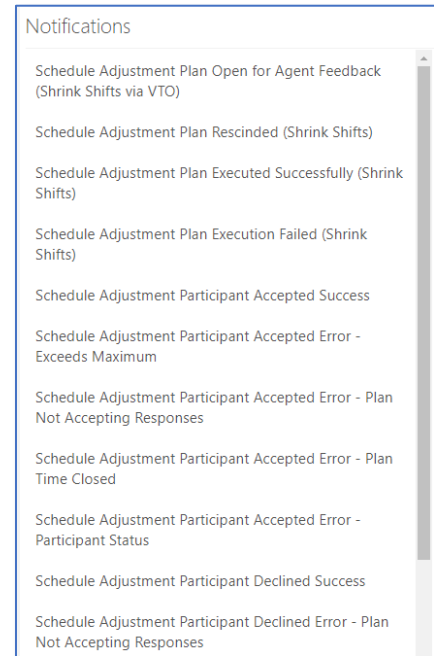
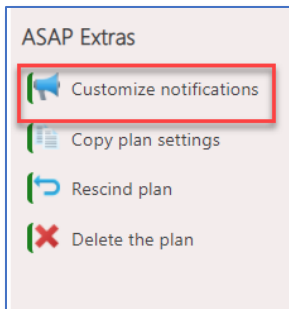


For each ASAP there are standard messages for both memos and pop-ups for every possible contingency within each plan. The messages are very polite, and agents will get a message, for example, when the ASAP is offered, when it is accepted, when it is declined, or even when a plan with a limit is full and they were too late to be included.

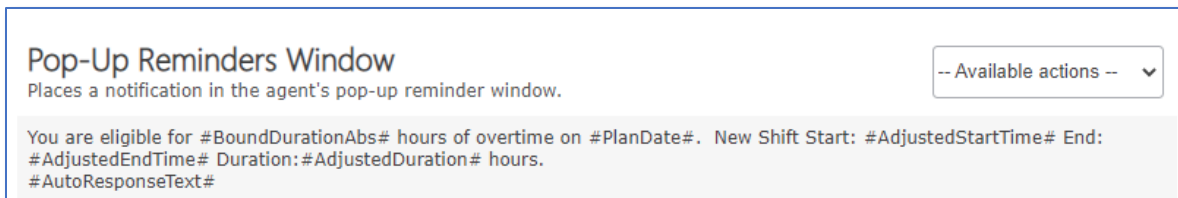
You can customize the messages that agents will see in the memo field and in the pop-up. Edits made here apply only to this instance of the plan.

To view or edit the notifications for a single plan:

1. Go to the ASAP Extras area and select *Customize notifications*.



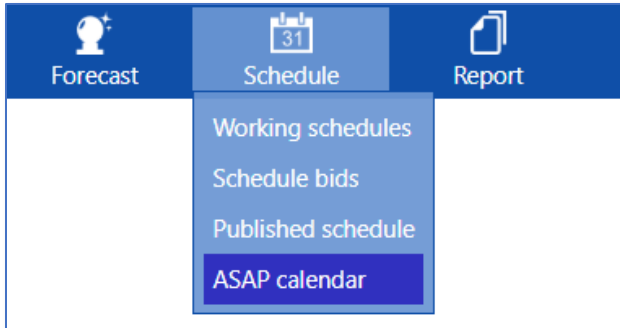
2. Click on the notification title to review the text for pop-up reminders and memos.





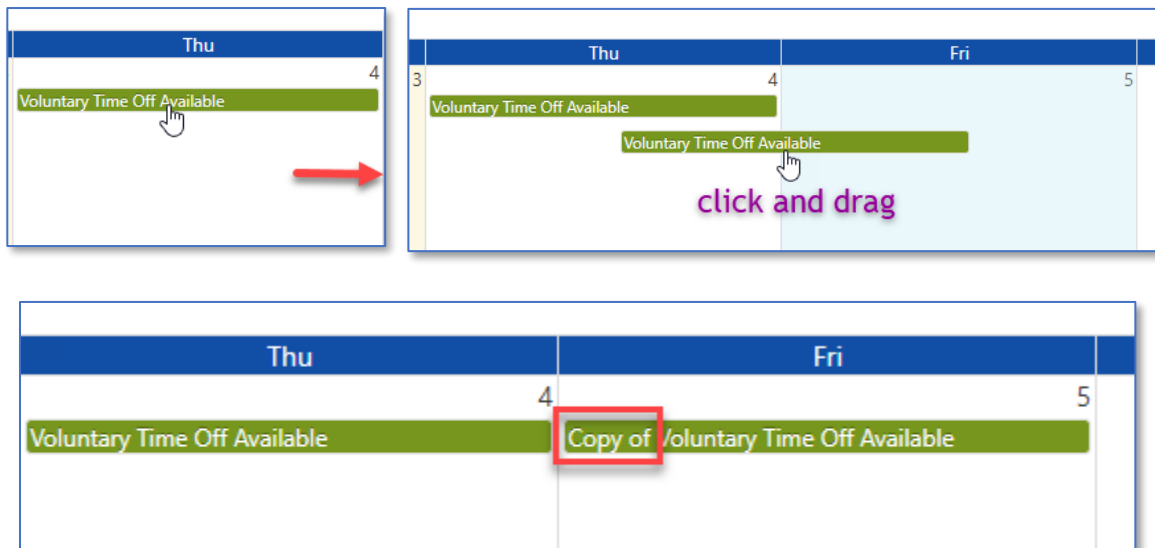
Copy Plans

You can easily copy commonly used plans and apply them to different days.



On the ASAP calendar, click and drag the plan to a new day. It will copy the ASAP with the basic parameters in place and a new name with "Copy of..." (moving will not change the original plan).

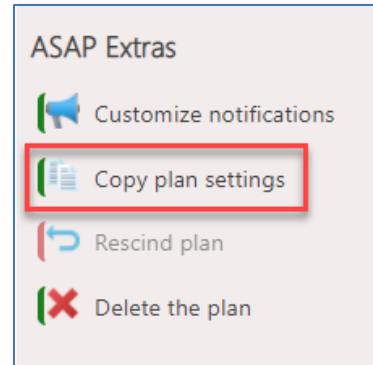
1. Navigate to the ASAP calendar:
2. Find the ASAP you wish to copy then click and drag to the new day.



3. Open the ASAP to make any needed edits to the plan then open for feedback or execute the plan. It is best practice to change the name of the copied plan. If you make multiple copies without changing the name, you will have "Copy of copy of copy of copy of copy of OT."



Alternatively, you can select *Copy plan settings* from the ASAP Extras area of any ASAP. You can choose whether to include eligible plan participants from the original ASAP.



Click *Save copy* after making your selections and the copied ASAP will appear on the ASAP calendar.

ASAP - Copy an existing plan

For plan **Overtime Shift Extension Available**
on schedule date **Tuesday, 10 August 2021 05:00 PM**

Override defaults for target plan

Target schedule date
8/11/2021

Copied plan name
Copy of Overtime Shift Extension Available

Include all eligible plan participants

Responsible administrator
Account, Service

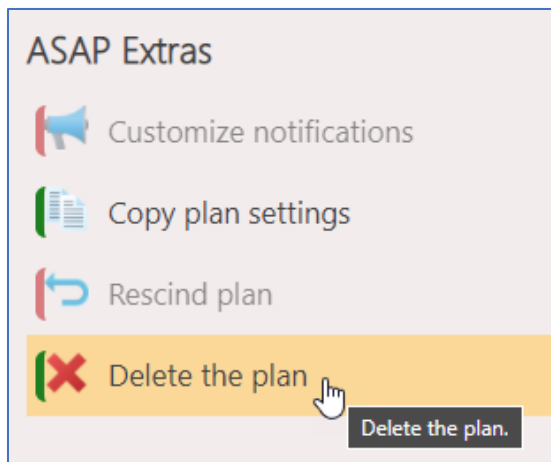
Save copy



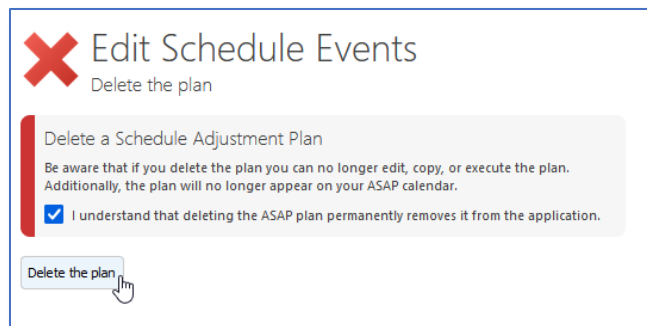
Delete Plans

After executing a plan, there is no UNDO button. If you delete the ASAP (*Delete the plan*), it does not undo the action; deleting the ASAP will not put anything back on the agents' schedules.

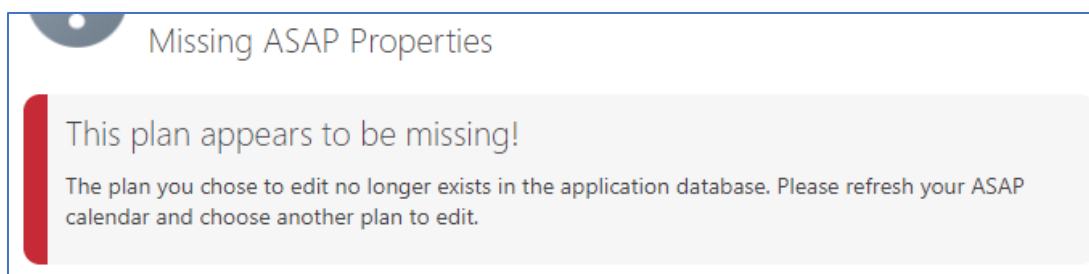
On the ASAP calendar, open the plan then select *Delete the plan* from the ASAP Extras area.



Because there's no going back, you need to check the box to confirm that you wish to delete the plan, then the *Delete the plan* button will become available. Refresh your browser if you still see the ASAP on the calendar.



After deleting you will see the following message:





Rescind Plan

For some plans you have the option of rescinding the offer if it is open for feedback and prior to plan execution.

- Create VTO Event
- Create Overtime Shifts
- Overtime Shift Extension
- Recover Off-phone Events

Note: If in the basic properties you selected to execute the plan upon acceptance, rescinding the plan will not delete any acceptances. You will have to manually delete them from the agent's schedule.

When rescinding a plan, you can elect whether to modify agent's current selections.

ASAP - Rescind a plan

For plan **Overtime Shift Extension Available**
on schedule date **Tuesday, 10 August 2021 05:00 PM**

You have elected to rescind the schedule adjustment plan. Please provide the following information and press the "Rescind the Plan" button below.

Rescind plan options

Responsible administrator
Account, Service

Participant feedback option

Do not modify the feedback selection

→

Do not modify the feedback selection ▼

Do not modify the feedback selection

Automatically decline the plan for pending participants

Rescind

As with deleting plans, there is no going back. Click *Rescind* to remove the plan from receiving any additional feedback or responses. Rescinded plans remain on the ASAP calendar in purple.

